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ABSTRACT

This monograph is a compilation of the knowledge gained by the Technical Assistance Center (TAC) of the Helen Keller National Center, from training and technical assistance activities conducted with state interagency teams serving youth and young adults with deaf-blindness. The book views interagency collaboration as essential in achieving community-integrated education, employment, and living outcomes for youth with deaf-blindness. Chapter 1 describes the purpose, benefits, design, and outcomes of the "cohort" training and technical assistance approach TAC uses with state teams. This approach involves training four to six state interagency teams during an intensive 2-3 day workshop, followed by specific and individualized technical assistance training activities for each state team. Chapter 2 focuses on the interagency collaborative process--what it means; what it entails; and the necessity of shared vision, interdependence of stakeholders, leadership, and communication. In Chapter 3, the salient aspects of a successful interagency process are discussed, with examples from several state teams in various evolutionary stages of the process. The development of a philosophy statement, the goal-setting process, the individual case study approach, parent involvement, interagency team-building and empowerment, and structural procedures are discussed. Chapter 4 discusses in more depth the critical component of parent involvement in the interagency team process. Chapter 5 presents strategies for identifying interagency problems and resolutions, facilitating group decision-making, and reaching consensus. Chapter 6 summarizes the critical points discussed in the preceding chapters. Appendices contain examples of state interagency team action plans, as well as structural procedures and guidelines for state interagency teams. (16 references) (JDD)

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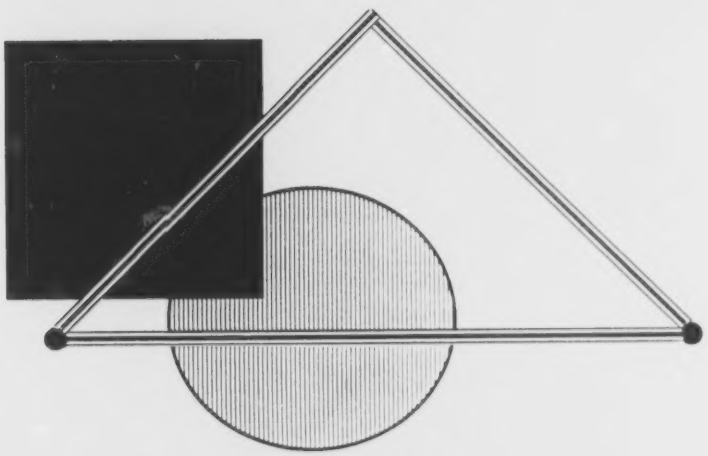
Interagency Collaboration for Young Adults with Deaf-Blindness:



Toward a Common Transition Goal

EC 301217

Authors:

Jane M. Everson, Ph.D.
Patricia Rachal, Ph.D.
Martha G. Michael, Ph.D.

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INTERAGENCY COLLABORATION FOR YOUNG ADULTS WITH DEAF-BLINDNESS:

TOWARD A COMMON TRANSITION GOAL

Written by:

Jane M. Everson, Ph.D.
Patricia Rachal, Ph.D.
Martha G. Michael, Ph.D.

Technical Assistance Center
Helen Keller National Center
Sands Point, New York

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PREFACE

The civil rights movements of the 1960s and 1970s introduced new concepts such as *normalization*, *least restrictive environment*, and *deinstitutionalization* to professionals serving people with severe disabilities and their families. Throughout the 1980s, these efforts toward community-integration continued to grow. Concepts such as *inclusion*, *transition* and *supported employment* evolved into the newest and most desired services. By the close of the last decade, community-integrated education, employment, and living were firmly established as preferred and effective programming outcomes for people with severe disabilities.

People with deaf-blindness are frequently excluded from community-integration efforts for numerous and complex reasons. The multiple support needs of people with deaf-blindness leads many professionals and families to believe that segregated and protected education and adult service environments are the most viable programming settings. However, some states *have* demonstrated successful community-integrated education, employment and living options for youth with deaf-blindness and other severe and multiple disabilities. The low-incidence of deaf-blindness leads many policymakers to believe that clustered educational, employment, and living settings are the most cost-effective and staff-efficient programming options. However, some states *have* demonstrated improved costs and staffing ratios with community-integrated and heterogeneous education, employment and living options for youth with deaf-blindness. As the 1990s began, many professionals, families and policy makers began to question the relationship between traditional deaf-blind programs and services and the community-integration movement. Evidence that youth with deaf-blindness could succeed in a variety of community-integrated settings could no longer be ignored. But their successes have in many ways bee limited by state and local program

capacities program capacity. Most state and local programs will need to make tremendous changes in their philosophy/values and service delivery structures if community-integrated outcomes for all youth with deaf-blindness are to be a reality.

In the early 1980s, there was also federal concern with the transition of youth with disabilities from educational services to community-integrated employment and living opportunities. In 1983, the U.S. Congress reauthorized the Education of the Handicapped Act (PL 98-199). A new component, Section 626, was added to the Act to address the provision of transition services. Section 626 authorized more than six million dollars each year for three years to address the problems of youth in transition. Transition services were defined to include interagency linkages between education and adult services, high school curriculum and services for youth with disabilities, and community-integrated adult outcomes such as supported employment and supported living. Section 622 of the Act, Services for Deaf-Blind Children and Youth, complemented these efforts by authorizing funding for a national technical assistance center to expand transition services to youth with deaf-blindness.

In 1990, Congress once again reauthorized the Education of the Handicapped Act retitled, the Individuals with Disabilities Education Act (IDEA, PL 101-476). IDEA defined transition as:

> *"a coordinated set of activities for a student, designed within an outcome-oriented process, which promotes movement from school to postschool activities including postsecondary education,vocational training, integrated employment (including supported employment), continuing education, adult services, independent living, or community participation."*
>
> *"The coordinated set of activities shall be based upon the individual student's needs, taking into account the student's preferences and interests, and shall include instruction, community experiences, the development of employment and other postschool adult living objectives, and when appropriate, acquisition of daily living skills and functional evaluation."*

> *IEPs must now include "a statement of the needed transition services for students beginning no later than age 16 and annually thereafter (and when determined appropriate for the individual beginning at age 14 or younger), including, when appropriate, a statement of the interagency responsibilities or linkages (or both) before the student leaves the school setting." (Section 626, PL 101-476)*

With the confluence of forces -- acceptance of community integration for people with severe disabilities, federal legislative mandates to include youth with deaf-blindness in these efforts, and shifting professional and parental attitudes, many education and rehabilitation agencies at state and local levels have begun to focus on the transition of youth with deaf-blindness. Community-integrated education, employment, and living have become an expectation for youth with deaf-blindness as well as youth with other severe disabilities. Following the expectation, however, there came a question: *How can states and local agencies make community-integrated options for youth with deaf-blindness a reality?* As we enter the 1990s, answers to this question are beginning to emerge.

THE ESTABLISHMENT OF THE TECHNICAL ASSISTANCE CENTER (TAC)

The Helen Keller National Center (HKNC) was awarded Section 622 funding from the U.S. Department of Education in 1984 to establish a national Technical Assistance Center (TAC). Since its beginning, its purpose has been to provide training and technical assistance to agencies and programs providing school-to-adult life transition services to youth with deaf-blindness. An additional purpose is to provide parents and families with the training they need to assume active roles in the transition process. TAC has three major goals:

- To provide technical assistance to assist agencies in developing transition services for youth with deaf-blindness;
- To provide technical assistance to assist agencies in increasing their capacity to continue the provision of transition services; and
- To develop resource materials for training and dissemination.

To achieve these purposes and goals, training and technical assistance are delivered to agencies and parents under five objectives. TAC's objectives are:

1. To assist states in assessing their technical needs in providing transition services to youth with deaf-blindness;

2. To assist state and local agencies with developing, implementing, or improving transition services and supports for youth with deaf-blindness;

3. To enable parents and family members to increase their effectiveness in the transition of their family member with deaf-blindness;

4. To assist states in interagency and collaborative efforts in their development of comprehensive state-wide transition services for youth with deaf-blindness;

5. To document and analyze the processes for providing pre-service and in-service training, technical assistance, and consultations.

Objective Four reflects TAC's commitment as a national project to help states and local agencies make community-integrated adult options a reality for youth with deaf-blindness by supporting collaborative interagency efforts in all states and territories requesting technical assistance. These collaborative interagency efforts have resulted in successful community-integrated outcomes for youth with deaf-blindness and active and informed roles for professionals and families.

INTERAGENCY TRAINING AND TECHNICAL ASSISTANCE ACTIVITIES

TAC's interagency training activities have evolved tremendously since 1984 when state and local agencies first began requesting technical assistance to support interagency collaboration. In 1984, there appeared to be much interest and need nationally in interagency collaboration, but there was little literature from which to develop transition training and technical assistance approaches. In addition, a literature review indicated that the limited interagency efforts toward the delivery of comprehensive transition services had met with

varied and somewhat limited success, particularly with individuals with deaf-blindness and other low-incidence disabilities. Often, the major outcome of these efforts was policy documents describing common barriers, but containing limited information on local implementation and service delivery strategies to overcome the barriers. Literature demonstrating specific community-integrated outcomes for individuals with deaf-blindness as a result of interagency collaboration was even more limited.

The literature verified that interagency collaboration was important, but no one agreed how to best achieve successful outcomes. Several conclusions were drawn from this literature: first, there was no one perfect paradigm to use for initiating and implementing interagency goals, problems, and processes; and second, to be successful, interagency efforts must be driven by the unique characteristics, needs and resources of each state. Thus, there would need to be multiple and emerging interagency models to address the diverse transition service delivery needs of multiple states and agencies.

Technical assistance requests received by TAC suggested that many states were struggling in their efforts to develop and deliver transition services because they lacked clear models to replicate. Therefore, TAC developed a training and technical assistance approach that provides teams with:

- information on value-based transition services and client outcomes;
- information on current interagency cooperative and collaborative transition practices;
- descriptions of not just one interagency approach, but several interagency models;
- discussions of strategic elements and salient characteristics of successful interagency efforts;
- discussions of factors that could either enhance or stymie cooperative and collaborative efforts;

- guidelines for initiating and implementing interagency cooperative and collaborative efforts; and
- strategies for maintaining systemic change.

Considering the paucity of interagency literature and transition guidelines for youth with deaf-blindness, TAC adopted a bottom-up training and technical assistance approach. Rather than impose one model of interagency coordination and collaboration on every state, TAC attempts to build upon the collective experiences of different states. TAC interagency training combines information on how to initiate comprehensive transition services with guidelines for implementing and maintaining interagency efforts. The training is based upon the experiences and observations of the 18 state interagency teams which have to date participated in TAC interagency training.

PURPOSE AND OVERVIEW OF THE MONOGRAPH

This monograph is a compilation of the knowledge gained from training and technical assistance activities with these state interagency teams. TAC has come to view the interagency process as evolutionary: a process that takes time, energy, and a willingness to work together on the part of all involved. TAC has also come to view interagency collaboration as essential if community-integrated education, employment, and living outcomes are to be achieved for youth with deaf-blindness. The following chapters illustrate the complexity of the process leading to the successes of these interagency teams. We are indebted to each of the professionals, parents, additional TAC staff and consultants who guided us through this learning process. This monograph is a testimonial to their efforts to develop transition services with community-integrated outcomes for youth with deaf-blindness. It begins to answer the question posed earlier: *How can states and local agencies make community-integrated options for youth with deaf-blindness a reality*?

Chapter 1 describes the purpose, benefits, design, and outcomes of the "cohort" training and technical assistance approach TAC uses with state teams. Chapter 2 focuses on the interagency collaborative process -- what it means, what it entails, and the necessity of shared vision, interdependence of stakeholders, leadership, and communication. In Chapter 3, the salient aspects of a successful interagency process are discussed with examples from several state teams in various evolutionary stages of the process. The development of a philosophy statement, the goal-setting process, the individual case study approach, parent involvement, interagency team-building and empowerment, and structural procedures are discussed. Chapter 4 discusses in more depth, the critical component of parent involvement in the interagency team process. Chapter 5 presents strategies for identifying interagency problems and resolutions, facilitating group decision-making and reaching consensus. Finally, Chapter 6, summarizes the critical points delineated in the preceding chapters.

J. M. Everson
P. Rachal
M. G. Michael

CHAPTER 1

TAC INTERAGENCY TRAINING AND TECHNICAL ASSISTANCE ACTIVITIES

Jane M. Everson
Patricia Rachal
Martha G. Michael

TAC interagency training and technical assistance activities are designed to achieve two purposes: first, to assist states in developing, strengthening, and documenting their state-wide interagency efforts to provide transition services to youth with deaf-blindness; and second, to assist states in drawing from the collective experiences of other states in order to identify principles, characteristics, obstacles, and strategies associated with the initiation and implementation of interagency collaborative transition services. TAC achieves these purposes by training a "cohort" of 4-6 state interagency teams during an intensive 2-3 day workshop. After attending a cohort workshop, state teams receive specific and individualized technical assistance training activities. A follow-up 2-3 day workshop is also provided to states approximately 12-18 months after the first workshop. TAC calls this type of activity a "cohort" training and technical assistance approach because of its emphasis on team building and group collaboration. The purpose of this chapter is to describe the benefits and design of the TAC cohort training approach and some of the outcomes achieved over the past six years.

BENEFITS OF THE COHORT TRAINING APPROACH

During the 2-3 day workshops, the cohort approach promotes knowledge-sharing among team members and among state teams by including the time to describe successes, seek advice, or share obstacles and problems encountered. Thus, as a state interagency team works

together to strengthen its own membership, it also benefits from the inter-state contacts team members make during the training. After the workshop, the cohort of states offers a network to professionals and parents addressing similar goals and challenges, but in many cases using quite different approaches to overcome the challenges and reach their goals. The cohort approach, emphasizing both intra- and inter-state sharing as well as intra- and interagency sharing is felt to be especially important because of the low-incidence and severity of deaf-blindness. State interagency teams are asked to focus on specific case studies during the cohort training and develop action plans to realize specific client outcomes. These case studies and action plans become specific and individualized resources to share between state teams and cohorts.

DESIGN OF COHORT TRAINING ACTIVITIES

The cohort training approach used by TAC includes an initial 2 - 3 day workshop attended by all the state teams in a cohort, followed by specific and individualized technical assistance delivered to each state. Follow-up workshops are generally offered to the cohort, approximately 12 to 18 months after the initial workshop. A state's participation in the ensuing workshops is generally dependent upon its progress toward its action plan's goals and objectives.

Recruiting Teams

The first step in the training activity is the identification of a small number of states to participate as a cohort. Typically, a cohort consists of four to six states. States are nominated by HKNC staff who are knowledgeable about deaf-blind services and activities across the United States. From the nominated states, 4-6 states are extended invitations to send a state interagency team to the initial 2 - 3 day cohort workshop. State teams are invited to the workshop with the expectation that members will work together as a team and with

TAC over a period of time, typically one to two years, as they implement their action plan.

States are invited to send an interagency team to a TAC cohort workshop because they have already taken some tangible steps toward collaborative interagency transition efforts. For example, priority is usually given to teams that have already been formed and have met one or two times. However, *all* invited teams must meet four general criteria. First, each team must include key representatives from the education and adult service agencies involved in transition service delivery. Second, each team must have a parent and/or consumer representative. Third, each team member must agree to fully participate in the cohort workshop, including making a group presentation and developing an action plan. Fourth, each team member must agree to implement the action plan's goals and objectives and participate in follow-up technical assistance activities. Table 1.1 on the following page is an example of the workshop agreement form used by TAC in the Fall 1990 workshop. Teams were asked to sign this form prior to attending the cohort activity.

Thus, each invited state is asked to send a 5-6 member interagency team to the workshop representing the key agencies involved in providing transition services for youth with deaf-blindness. TAC encourages the teams to include representatives from special education, rehabilitation, mental retardation and/or developmental disabilities, and a parent and/or deaf-blind consumer. Other agencies, such as a Commission for the Blind or Commission for the Deaf representative may be included, as appropriate for a state's individual service delivery system. Usually, teams are pulled together by one individual listed as the contact person on the nomination form. In the rare instances when a team has not been initiated and identified contact persons do not know individuals in the other key agencies, TAC assists with the identification of other team members and the initial development of the state interagency team.

Table 1.1

HELEN KELLER NATIONAL CENTER
TECHNICAL ASSISTANCE CENTER

"Supporting Young Adults with Deaf-Blindness in Community Integrated Settings: Strategies for Interagency Services
Albuquerque, New Mexico
September 26 - 28, 1990

WORKSHOP AGREEMENT FORM

Name:_____ Title:_____

Address:_____

_____

Home Telephone:_____ Work Telephone:_____

I agree:

a) To participate in the September 1990 workshop. I will be prepared to share my team's mission statement and current interagency efforts in a 10-minute oral presentation.

b) To develop an action plan at this workshop, to be approved (with revisions as necessary) by the full state interagency task force.

c) To work on implementing strategies set forth in the action plan by meeting regularly between the Fall 1990 workshop and the workshop tentatively planned for Fall 1991.

d) To participate in one on-site TAC follow-up visit between the first and second workshops, plus 2- 3 telephone updates; additional TAC technical assistance specific to state goals may be requested and may be provided.

e) To attend the second cohort meeting in the Fall 1991, subject to having made significant progress toward identified goals.

Date:_____ Signature_____

cc: Regional Representatives

It is important for representatives from each of the key agencies to be a part of the team and attend the cohort workshop. Representatives should be those people who are able, either by position or personal leadership skills, to effect change within their agencies and states. It may not be possible, or even necessary, to have the head of an agency attend a cohort training workshop. However, it *is* important that each team representative have the approval of and access to the director of the agency to ensure agency commitment and continued flow of information. It is also important to have a parent representative on the team because of the advocacy and service delivery priorities he or she can provide.

TAC has facilitated three cohort training activities to date. Six states were invited to join the initial cohort of states (i.e., Illinois, Texas, Alabama, Minnesota, Kentucky, and Oregon). An additional six states were invited to join the second cohort (i.e., North Carolina, Idaho, New Jersey, Wisconsin, Utah, and Arkansas); and five states were invited to join the third cohort (Ohio, Missouri, Arizona, North Dakota, and New Mexico). New York was provided a comparable training activity using a cohort of five local interagency teams. To achieve maximum variation in each cohort, states were also selected which offer diversity in: 1) deaf-blind population size; 2) geographic characteristics; and 3) current use of interagency transition approaches.

Finally, although TAC uses the term "team", it is used cautiously during recruiting activities. More often than not, the collection of individuals who come together from one state are not, in the true definition of the word, a *team* at the beginning of a cohort training. In fact, in more than one instance, team members from different agencies within the same state met each other for the first time at a cohort workshop! However, throughout the cohort training activities, teams mesh and evolve as a result of the training activities and shared experiences. By the conclusion of the initial workshop, teams have usually made appreciable strides toward interdependence and shared goals.

The Setting

As in all personnel training activities, the setting is an important element in the design and implementation of the cohort workshops. Each cohort workshop is held in one of the participating states. This allows a "host" state to invite each of the other states in the cohort and to share suggestions for restaurants and sightseeing trips.

Except for the host teams, state interagency teams travel from their home states to participate in cohort workshops. In several instances, the opportunity to travel from their home state to share successes and obstacles with other states involved with comprehensive transition services to individuals with deaf-blindness, initially provides a new team with a catalyst for development, and existing teams with a reason for continuing efforts. TAC attempts to create a neutral and supportive setting, where networking can occur and relationships can begin. Chairs, tables, and flip charts are arranged to create a setting conducive to collaboration. Group breaks and meals are also arranged to encourage collaboration.

Pre-Workshop Activities

Before each workshop, state teams are asked to complete several activities. These activities allow newly formed teams to engage in some concrete tasks prior to attending the cohort workshop and thus bring specific issues to share with other teams during the training. Examples of pre-workshop activities vary across cohort training activities, but include: (1) a determination of the number of transition-aged youth with deaf-blindness in a state; (2) composite pictures of individuals whom the team believes have the "best" services within the state and an individual who has the "worst" services in the state; and (3) a report on the accomplishments of the interagency task force or team to date. Teams are asked to share the results of these activities with the other state teams in their cohort during a 10-minute presentation on the first day of the workshop.

Workshop Goals

The complete cohort training approach includes an initial workshop with follow-up workshops offered 12-18 months apart and connected by specific follow-up technical assistance activities in each state. The cohort training approach emphasizes the process of developing state-wide transition efforts by addressing three goals. These goals are:

- To increase knowledge and application of the interagency process to achieve school-to-adult life transition services for individuals with deaf-blindness;
- To use the interagency process to focus on specific client outcomes and enhanced local service delivery;
- To reach a team commitment to the need for and methods of achieving state-wide system change.

To achieve these goals, a variety of training activities are provided during the workshops. The workshop activities include:

- Professional presentations on key transition services and outcomes, e.g., community-integrated educational, employment and living services;
- Interpersonal team dynamics and team-building activities;
- State team discussions and small group problem-solving activities;
- Team action plan development.

The initial and follow-up workshops are connected by specific technical assistance activities, individualized to the needs of a state team. Technical assistance activities include:

- Presentations by consultants and TAC staff during interagency team meetings in the teams' home states;
- Telephone communication and consultation with TAC staff and other state teams in the cohort;
- Written communication and consultation with TAC staff and other state teams in the cohort.

Agenda Development

Individualized agendas are developed prior to each cohort training activity. Therefore, each workshop has a different agenda that responds to identified state needs. Usually, team members are asked to complete a training needs assessment prior to attending a workshop. These data are used to develop agendas and plan training activities.

Agendas are developed to meet workshop goals by responding to three questions: 1) *What are the individual state's interagency transition needs?* 2) *What are the state's current transition outcomes and services*? and 3) *Where is the state team in the evolutionary interagency process*? For example, interpersonal skills training was included in the second cohort of states, because in their needs assessments states expressed interpersonal difficulties within their teams. Presentations on employment services and community living skills services are included in all cohort workshops because most professionals have expressed limited knowledge of constantly changing best practices for youth with deaf-blindness. Although action planning is included in all training workshops, problem-solving exercises such as force field analysis (see Chapter 5) were included in the latter workshops to give teams more strategic methods for developing action plans. Tables 1.2 and 1.3 on the following pages are examples of actual agendas used in two different cohort workshops.

Table 1.2
STRATEGIES FOR INTERAGENCY SERVICES:
SUPPORTING YOUNG ADULTS WITH DEAF-BLINDNESS
IN COMMUNITY INTEGRATED SETTINGS

WEDNESDAY, SEPTEMBER 26, 1990

2:00 - 2:30 p.m.	**Welcome & Introductions** Jane M. Everson, Project Director, HKNC-TAC Martha G. Michael, Program Associate, HKNC-TAC
2:30 - 3:15	**"Transition as an Interagency and Outcome-Oriented Process"** Jane M. Everson
3:15 - 3:30	**Discussion**
3:30 - 4:00	**"Salient Aspects of Interagency Collaboration"** Patricia Rachal, Interagency Consultant, HKNC-TAC
4:00 - 4:15	**Break**
4:15 - 5:15	**State Presentations and Discussion: Missouri, Ohio** Martha G. Michael
5:15	**Adjourn**
6:30 - 7:00	**No-Host Social**
7:00	**Dinner: Opportunity for Team Networking**

THURSDAY, SEPTEMBER 27, 1990

6:00 - 8:30 a.m.	**Breakfast** [*Complimentary breakfast served by hotel*]
8:30 - 9:30	**State Presentations and Discussions: North Dakota, Arizona, New Mexico** Mike McCarthy, Program Associate, HKNC-TAC
9:30 - 11:30	**Concurrent Sessions** [*Please choose one*] • **Community Integrated Employment** Jane M. Everson • **Community Integrated Living** Stephen Perreault, National Consultant Hilton-Perkins Project Perkins School for the Blind Watertown, MA

	• **Personal Futures and ITP Planning** Mike McCarthy
11:30 - 12:00 p.m.	**Team Sharing** Martha G. Michael
12:00 - 1:30	**Box Lunch** Breakout Activity by Agency/Parent Groups: "Discussion of Key Issues in Transition Planning"
1:30 - 2:30	**Report Out** Martha G. Michael
2:30 - 4:30	**"A Successful Interagency Implementation Case: Clients in Wisconsin"** Martha G. Michael Selma Getsinger Wisconsin Rapids, Wisconsin Norma Gottschalk Stoughton, Wisconsin
4:30 - 5:00	**"Introduction to Force-Field Analysis"** Patricia Rachal
5:00	**Adjourn**
	Evening On Your Own

FRIDAY, SEPTEMBER 28, 1990

6:00 - 8:00 a.m.	**Breakfast** [*Complimentary breakfast served by hotel*]
8:00 - 9:00	**Force Field Analysis [FFA]: "Identification of the Problem"** Patricia Rachal
9:00 - 10:00	**FFA: "Identification of Solution"**
10:00 - 10:30	**Report Out** Martha G. Michael
10:30 - 11:30	**FFA: "Identifying the Restraining and Driving Forces"**
11:30 - 12:30 p.m.	**FFA: "Changing the Forces: Creating the Action Plan"**
12:30 - 1:30	**Box Lunch (Action Planning Continued)**
1:30 - 2:00	**Summary and Next Steps** Jane M. Everson

Table 1.3
VALUE-BASED SERVICES: STRATEGIES FOR CHANGE

MONDAY, JUNE 26, 1989

8:30 a.m.	**Opening Remarks & Introductions** Angela M. Covert, Project Director, HKNC-TAC
9:00-10:00	**Defining Values: The Beginnings of Change** Buzz Bronicki University of Kansas at Lawrence
10:00-10:15	**Break**
10:15-11:15	**Identifying Quality Services** Michael McCarthy, Program Associate, HKNC-TAC
11:15-Noon	**State Presentations: Arkansas, Wisconsin** Chair: Martha Michael, Program Associate, HKNC-TAC
12:00-1:15	**Lunch (on your own)**
1:15-2:15	**State Presentations: Utah, North Carolina, New Jersey** Chair: Martha Michael
2:15-2:30	**Break**
2:30-3:00	**Service Date: Do They Reflect Your Values** Angela M. Covert
3:00-4:00	**Interpersonal Skills: An Overview** Mary Ann O'Neil O'Neil Associates
5:30	**No Host Social**

TUESDAY, JUNE 27, 1989

8:30-11:30 a.m.	**Interpersonal Skills: A Strategy for Developing Teams** Mary Ann O'Neil
11:30-1:00 p.m.	**Box Lunch**
1:00-1:30	**Introduction to Problem Solving: Force Field Analysis (FFA)** Patricia Rachal, Interagency Consultant, HKNC-TAC
1:30-2:45	**FFA: Identifying the Problem** Patricia Rachal
2:45-3:00	**Break**

3:00-4:00	**FFA: Identifying the Solution** Patricia Rachal
4:00-4:20	**FFA: Introduction to Identifying Driving and Restraining Forces** Patricia Rachal
4:30	**Adjourn**

WEDNESDAY, JUNE 28, 1989

8:00-9:30 a.m.	**FFA: Identifying Driving and Restraining Forces** Patricia Rachal
9:30-9:45	**Break**
9:45-10:45	**FFA: Changing the Forces** Patricia Rachal
10:45-11:45	**FFA: Creating the Action Plan** Patricia Rachal
11:45-12:15 p.m.	**Summary/Conclusion**
12:15	**Adjourn**

Workshop Activities

The purpose of working with state interagency teams over a period of time is to facilitate an effective interagency collaborative process, ultimately resulting in specific client outcomes and enhanced local service delivery. Thus, the major content of the workshops includes these themes and focuses:

- *Interagency Collaboration as a Process* -- a focus on increasing knowledge, and application of the interagency collaborative process to enhance local transition services for youth with deaf-blindness. This includes presentations on the salient characteristics of successful interagency collaboration; e.g., key players in the process; common barriers and pitfalls; and strategies for addressing these issues and overcoming obstacles.

- *Achieving Client Outcomes through Interagency Collaboration* -- a focus on increasing knowledge about community-integrated client outcomes, e.g., supported living, supported employment, and the use of the interagency process to attain these specific transition outcomes for clients with deaf-blindness.

- *Local Service Delivery Issues* -- a focus on enhancing local transition services through interagency efforts, emphasizing, value-based services and cohort outcomes for a small group of individual cases.

- *Systemic Change* -- a focus on identifying one or two significant policy issues or policy problems reflected in state systems, and delineating the steps and actions necessary to change the systems and achieve client outcomes on a wide-spread basis.

An important aspect of the training, which overlays all training content and activities, is an effort to assist state teams with examining, defining, or redefining, and articulating the value-base of their current transition systems and services. This leads to an activity where teams develop a new mission statement or refine an existing philosophy/value statement. This philosophy/value statement serves as a basis to examine whether current transition services are congruent with stated values. This is an extremely difficult task for most state interagency teams. But once a common value-base is defined, the identification of goals and strategies for achieving quality client-centered transition outcomes becomes a much clearer process.

A- teams engage in problem-solving exercises to identify strategies for implementing their objectives, they can then compare their value-base with their goals and objectives to ensure reflection of their stated values.

Another aspect which also overlays all training activities is team-building. Often interpersonal relationships, turf issues, and unavoidable negative dynamics of group behaviors hinder achieving the teams's objectives. Team-building enhances communication by assisting teams with recognizing these issues and problem-solving strategies for resolution.

Finally, another important thread throughout the training is a focus on leadership skills. This is important because some members of the cohort teams might consider themselves in positions unable to achieve systems change. Leadership training assists entire teams, as well as the individual members, with feelings of empowerment. Leadership training assists teams with effecting change using their own personal leadership skills and their knowledge of best practices transition services.

Each workshop culminates with an action planning activity. This provides teams with an opportunity to target issues for problem solving specific to the state, and to share action plan objectives and activities across states. All workshops seek to maximize information transfer between and among states during this action planning process. Thus, each state team develops an action plan by setting goals, defining activities necessary to reach the objectives, specifying timelines, and assigning parties responsible for each activity. Table 1.3 on the following pages is an example of the form used by state teams to develop action plans. Examples of completed action plans developed by several interagency teams are included in Appendix A, at the conclusion of the monograph.

OUTCOMES OF THE COHORT TRAINING APPROACH

Implementation of a state team's action plan's goals and activities is usually assisted by follow-up technical assistance offered by TAC staff after the initial workshop. In most cases on-site follow-up is provided to each state to assist the team in achieving the objectives it sets at the cohort workshops. In all cases, telephone and written follow-up is provided after the initial workshop. Specific and individualized technical assistance activities are essential in encouraging, assisting, reinforcing and monitoring implementation of cohort goals and action plan activities. Depending upon each team's progress in implementing the plan's goals and activities, the cohort members are invited to attend a follow-up workshop with the same states approximately 12-18 months after the initial workshop. This follow-up workshop enables teams to share their progress as well as obstacles and to participate in additional presentations on best practice strategies and team building activities.

HELEN KELLER NATIONAL CENTER (HKNC)
TECHNICAL ASSISTANCE CENTER (TAC)

Action Plan

TA Activity: _____ Date(s): _____

Name of State or Agency Writing Action Plan: _____

Contact Person: _____ Phone: _____

Participant(s): _____ _____ _____

_____ _____ _____

Objective: _____

_____

ACTIVITY	RESPONSIBLE PERSON(S)	TIMELINE	EVALUATION PROCEDURE

Action Plan, Continued

Objective: _____

_____

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ACTIVITY	RESPONSIBLE PERSON(S)	TIMELINE	EVALUATION PROCEDURE

In summary, the three cohort training activities provided by TAC thus far have provided 18 state interagency teams with:

- Presentations of material by outside experts on transition issues relevant to the workshop themes.
- A sharing of information, ideas, problems, and solutions within a network of states; and,
- An opportunity to state goals and set action timelines; and
- A periodic review of progress within the states from one meeting to the next.

An equally important outcome of cohort activities is the opportunity states enjoy to enhance the network of key players within each state and between states, and to share information about successes, problems, dilemmas -- some common to all participants, some unique to a particular state's environment. State interagency teams value both the opportunity to connect with key players (service providers, parents, etc.) in-state and the opportunity to learn from the activities of their colleagues in different states -- allowing them to cull from this experience lessons they might well apply to their own state's interagency transition efforts. By far, however, the most important outcomes are the community-integrated opportunities achieved by the state teams for the individual clients they address through their action plan development and case study focus.

CHAPTER 2

COLLABORATIVE INTERAGENCY TRANSITIONAL SERVICES: CHARACTERISTICS AND RELATIONSHIPS

Jane M. Everson

During the past decade a new term emerged in professional literature and federal and state educational policies. The term is ***transition*** and it encompasses a vast array of new roles and activities for families, educators, and other human service providers concerned with the quality of life of young adults with deaf-blindness. Stated in much of this literature and implied in much other literature are such key concepts as ***collaboration***, ***coordination***, ***interagency linkages***, ***leadership***, ***empowerment***, and ***partnerships***.

Like many goals which are easy to envision, but difficult to achieve, comprehensive transitional services demand incorporation of these concepts through teamwork. Transition planning and delivery undertaken by teams of professionals, consumers, and parents can achieve more and better opportunities for young adults with deaf-blindness than individual decision-making and actions. During transition planning, individual family members and professionals may justifiably feel pressured and say, "*It's not my responsibility*!", but through collaborative interagency transitional planning and delivery, teams can say with assurance, "*We can make a difference*!"

The purpose of this chapter is to discuss the relationship between three key concepts: ***collaboration***, ***interagency***, and ***transition***. The premise of this chapter, and indeed this entire monograph, is that state interagency teams *can* make a difference in the planning and delivery of transitional services for youth with deaf-blindness. However, an additional premise is that professionals and family members do not naturally have the skills or desire to work together as members of teams without the benefit of training such as the TAC cohort approach.

WHAT ARE TRANSITIONAL SERVICES?

In the earliest literature, (e.g., Will, 1984), professionals expressed both a need and desire for collaborative interagency transitional services, but questioned the capability of current systems and professionals to develop comprehensive quality services. More recent literature (e.g., Heal, Cooper, & Rusch, 1990; Hardman & McDonnell, 1987; Wehman, Moon, Everson, Wood, & Barcus, 1988) describes both successful models of collaborative interagency transitional processes as well as common barriers and implementation issues.

Transition has been defined in various ways by numerous professionals and policymakers, but all of the literature and policies have at least three common themes. First, transition is a multi-year planning process (Will, 1984) resulting in a comprehensive adult lifestyle for youth with disabilities (Ludlow, Turnbull, & Luckasson, 1988). Second, the planning process requires collaboration from multiple agencies and professionals with strong family input (Wehman, et al., 1988). And third, delivery of successful transitional services requires the development of family and professional partnerships (Turnbull, Turnbull, Bronicki, Summers, & Roeder-Gordon, 1989).

Most recently, Public Law 101-476, The Individuals With Disabilities Education Act (IDEA), defined transition as: "... a coordinated set of activities for a student, designed within an outcome-oriented process, which promotes movement from school to postschool activities including postsecondary education, vocational training, integrated employment (including supported employment), continuing education, adult services, independent living, or community participation". To assist students, families, and professionals in successful transition planning, IDEA further stipulates that IEPs (Individualized Education Plans) must now include "... a statement of the needed transition services for students beginning no later than age 16 and annually thereafter (and when appropriate for the individual, beginning at age 14 or younger), including, when appropriate, a statement of the interagency

responsibilities or linkages (or both) before the student leaves the school setting".

Similarly, TAC views the transition of youth with deaf-blindness as a comprehensive, outcome-oriented process focusing on the development of a total adult lifestyle for the individual. The planning and delivery of transitional services provides the individual with deaf-blindness and his or her family with an array of collaborative, interagency educational and adult services supporting community-integration. Transitional services provide youth with deaf-blindness opportunities in community settings where they and their families can experience community presence and participation, competence, respect, and choices (O'Brien, 1978).

The foundation or value-base for the planning and delivery of transitional services is belief in the right of individuals with deaf-blindness to live, work, and recreate in community settings. Thus, transitional services, Table 2.1, focus on outcomes and support services which naturally emerge from this value-base.

Table 2.1

- *Employment opportunities* - longitudinal vocational training provided by educational programs results in transition to either time-limited or supported employment opportunities in community-integrated settings. An array of natural, technological, behavioral, environmental and instructional supports ensure both maintenance and career growth for individuals with deaf-blindness.

- *Postsecondary education opportunities* - educational preparation results in transition to postsecondary adult education opportunities including college, university, and vocational technical programs. Instructional and environmental modifications ensure successful completion of educational goals and objectives and ensure smooth transition to next steps for individuals with deaf-blindness.

- *Independent or supported living opportunities* - educational programs results in transition to homes located in communities. An array of natural, technological, behavioral, environmental and instructional supports ensure both maintenance and growth for individuals with deaf-blindness.

- *Homemaking/personal care activities and supports* - educational programs prepare and adult services support individualized levels of independence in homemaking and personal care activities within home and work settings. An array of natural, technological, behavioral, environmental and instructional supports ensure both maintenance and growth for individuals with deaf-blindness.

- *Financial/income needs* - adult service programs support access to planning information and entitlement resources for supplemental security income (SSI) Medicaid, social security disability insurance (SSDI), Medicare, and other benefits and resources.

- *Use of generic community resources* - education programs prepare and adult service programs support the use of generic community resources by youth with deaf-blindness and their families. An array of resources may be appropriate including but not limited to public health departments, libraries, public transportation, shopping centers, medical centers, etc. An array of natural, technological, behavioral, environmental and instructional supports ensure both maintenance and growth for individuals with deaf-blindness.

- *Recreation/leisure activities* - education programs prepare and adult service programs support both individual and group activities in community settings with family and friends. An array of natural, technological, behavioral, environmental and instructional supports ensure both maintenance and growth for individuals with deaf-blindness.

- *Friendships and other relationships* - education programs prepare and adult service programs support opportunities for friendships and other relationships with peers and others during employment, living, and recreation opportunities. An array of natural, technological, behavioral, environmental and instructional supports ensure both maintenance and growth for individuals with deaf-blindness.

WHAT IS INTERAGENCY COLLABORATION?

Interagency and ***collaboration*** are terms that are all too lightly tossed about when discussing transitional services for young adults with deaf-blindness. Interagency and collaboration, when viewed separately are desirable characteristics of transitional services, but when joined together have tremendous implications for the planning and delivery of successful transitional services.

Interagency, as its root implies, means between or among agencies. Thus, it should be differentiated from the term *intra*-agency which means within agencies. The difference is important.

Interagency dictates teamwork. Interagency teamwork requires skills and commitments many levels beyond simply meeting together, sharing information, writing interagency agreements, and evaluating efforts. Interagency teams are essential in the planning and delivery of comprehensive transitional services for young adults with deaf-blindness. The agencies and professions most frequently involved are special education, related educational services, vocational education, general rehabilitation services and/or rehabilitation services for the blind/visually impaired or deaf/hard of hearing, mental health/mental retardation services, along with other locally available adult service agencies and professionals. Parents and family members, along with consumers, also bring their own unique experiences and team issues to the group. Each of these agencies has expertise and resources to contribute to transitional services for young adults with deaf-blindness. However, the diversity of these agencies challenges teams to address and respond to agency barriers as an on-going part of transitional services planning and delivery.

Effective interagency teams discuss and seek to overcome such traditional agency barriers as diverse professional preparation resulting in specialized points of view, ideologies,

values, and jargon; competition among agencies for resources, influence, power, and status; and role ambiguity and incongruent expectations, especially among professionals and parents (Garner, 1982). This process is known as collaboration.

Collaboration is an advanced phase of teamwork which encompasses numerous related concepts -- communication, cooperation, consensus building, confrontation of problems, compromise, coordination, consistency, caring, and commitment (Garner, 1982; Varney, 1989). Collaboration can only result when teams have progressed beyond simply communicating shared information during meetings and through interagency agreements. Collaboration can only result when teams have progressed beyond coordinating assessment, evaluation, and referral data. Collaboration occurs when interagency teams become interdependent in relation to their goals and mission, so that each member influences and is influenced by every other member (Bertcher, 1979).

Interagency collaboration enhances the likelihood that young adults with deaf-blindness achieve community-integrated adult outcomes. For example, collaborative interagency teams develop and implement individualized transition plans (ITPs) which target the adult outcomes and support services described earlier in this chapter. Collaborative interagency teams might develop three-way interagency agreements with an action-orientation to place, train, and support individuals with deaf-blindness in supported employment opportunities.

CHARACTERISTICS AND RELATIONSHIPS OF COLLABORATIVE INTERAGENCY TRANSITIONAL SERVICES

• Visionary Thinking

Shared visions are essential in planning and delivering collaborative interagency transitional services. Shared visions emerge from a common value-base for service delivery and evolve over time through communication, cooperation, consensus building, confrontation of problems, compromise, coordination, consistency, caring, and commitment.

A major aspect of TAC cohort training, as discussed throughout this monograph, focuses on helping teams develop a philosophy/value statement. Training activities are designed to enable the group members to increase their understanding of the abilities, as well as the support needs, of individuals with deaf-blindness. All training activities are grounded in TAC's value-base of community presence and participation, competence, respect, and choices for young adults with deaf-blindness (O'Brien, 1978), but encourage team members to question and re-confirm their personal and team values as part of team consensus-building.

Another important component of transitional services planning is the development of an ITP or personal profile of the accomplishments, dreams, and support needs of each young adult with deaf-blindness. Transition plans are developed by interagency teams in order to focus transitional services efforts toward individual clients or students. Most transition plan formats address the adult lifestyle areas and supports described earlier in this chapter. With input from the most critical teams members -- students themselves and their family members -- interagency teams should address each lifestyle area. A personal profile should answer these questions: What is the youth's life story? Who are some of the important people and what are some of the important places in the youth's life? What are the youth's likes and dislikes? What opportunities does the youth have for choice-making? How, when, why, and with whom does the youth communicate and socialize? What does a desirable future look like for the

youth? (Mount & Zwernik, 1988). There are a variety of transition planning forms and documents commercially available, any number of which may be adopted or adapted to focus a team's planning activities. However, whatever form or document is selected must encourage team members to think about the capacities of individuals with deaf-blindness, envision images of desirable futures for the individuals, identify obstacles and opportunities in attaining the vision, and identify steps for an action-orientation (Mount & Zwernik, 1988).

During TAC cohort training activities, teams learn to use visionary thinking to develop and implement transition plans for individuals with deaf-blindness. Teams learn to identify individual client or student outcomes which complement the team's philosophy/value statement and ensure an action-orientation approach.

- **Action-Orientation**

Action-orientation is the team's recognition of the need for and commitment to systems change as part of transitional services planning and delivery. Visionary thinking ***alone*** will not result in new and different adult outcomes for young adults with deaf-blindness. For changes to occur, teams must identify objectives and measure their success against an action plan containing specific and measurable objectives.

During cohort training activities, TAC requires teams to develop action plans in order to solidify relationships among team members and articulate activities, responsible personnel, and timelines for moving toward the desired vision. One way for teams to view action plan objectives is as either outcome or process objectives.

Outcome objectives focus the team's activities toward one or more individuals with deaf-blindness who have been identified as target case studies. Outcome objectives address quality of life changes for individuals as a result of new or enhanced service delivery. Outcome objectives may reduce unemployment rates or waiting lists or increase numbers of

ITP's written, number of community-based instruction sites developed, etc. For example, an outcome objective for one team's action plan might state: John, Mary, and Bill will be placed and maintained in supported employment opportunities in their home communities within the next 12 months. Another objective might state: John and Bill will be supported in a two-bedroom apartment within the next 12 months. These outcome objectives also become a part of John, Mary, and Bill's individual transition plans.

Process objectives are team management objectives. They enable teams to monitor and evaluate their progress toward achievement of outcome objectives. Process objectives assist teams in identifying interim steps in the systems change process. An example of a process objective might be: Within the next 6 months, the school for the deaf and local departments of rehabilitative services will develop a written referral and assessment policy for transition-aged youth with deaf-blindness. Another process objective might state that the department of social services will contract with XYZ Industries to provide supported living opportunities within the next 9 months.

Other important process objectives assist teams with team growth and development. Teams frequently find it necessary to address teamwork skills such as initiating ideas, responding to other team members, and active listening and processing information (O'Neil Group, 1990). For example: Within the next six months, the state team will elect a chair and secretary and develop procedures for initiating, conducting, and following up meetings. Another example might include: Within the next six months, the state team will develop operating policies and procedures to ensure more efficient and effective team meetings.

SUMMARY

The planning and delivery of transitional services for young adults with deaf-blindness requires time and work from all involved parties. It requires an understanding of the value-base and complexities of transitional services. It also requires a commitment to interagency services and collaboration. TAC cohort training seeks to create an environment where individual team members and teams can learn, reflect, and grow in their knowledge of quality transitional services and dynamics of collaborative interagency processes. Guided by TAC staff, consultants, and their own peers, they begin the development of a philosophy/value statement and a visionary action plan for systems change.

CHAPTER 3

SALIENT ASPECTS OF THE COLLABORATIVE TRANSITION PROCESS

Patricia Rachal

TAC's experience with state and local interagency teams suggests a number of factors that can be identified as salient to the process of building a cohesive interagency group. These factors facilitate the delivery of transition services to individuals with deaf-blindness. While TAC believes that no one model or perfect paradigm of interagency cooperation exists - and if applied by all interagency teams would result in immediate and sterling successes - there do exist some common threads or themes, some salient aspects that can be culled from TAC's work with interagency teams.

Table 3.1 presents these salient aspects of successful interagency practice. These aspects should prove useful to teams at all stages of the interagency process, from those in the embryo phase to those which have been in existence for several years, from those formally established by state sanction to those most informal in name and procedure.

TABLE 3.1

SALIENT INTERAGENCY TEAM ASPECTS

1) Philosophy/value statements to provide parameters for interagency goals;
2) Goal-setting process and the importance of avoiding goal displacement;
3) A focus on individuals and case studies as part of the interagency process;
4) Parent involvement on interagency teams;
5) Team empowerment as a key motivating force;
6) The evolutionary process of interagency team-building;
7) Structural/procedural guidelines to help coordinate the interagency process.

PHILOSOPHY/VALUE STATEMENTS

The goal-setting process for an interagency group is an important crossroad for team development. When Alice was in Wonderland and came to a fork in the road she asked the Cheshire Cat, sitting in the tree, which path she should take. The cat asked, "*Well, where are you going*?" Alice responded, "*I don't know.*" "*Then*," the Cheshire Cat said, with infinite disdain, "*either path will take you there.*"

An important lesson can be gleaned from Alice's experience. If an interagency team does not ask itself why it exists, to what ends does it work, and if it does not achieve a consensus on this point, it matters neither how it proceeds to identify ends, nor how it determines means to these ends.

Step one, then, is to work toward arriving at an agreed upon philosophy or value statement. A philosophy/value statement provides the basic foundation on which the interagency team can build its goals, and thereby identify appropriate activities to reach those goals.

A philosophy/value statement does not reflect *who* the members of an interagency group are or even *what* they are there to do. Rather, it reflects and emphasizes *why* the individuals have agreed to meet as an interagency team and *what* values (however broad) have brought the team together in the first place. The two examples below contrast one philosophy statement that serves to identify common values that can be used to derive the goals and activities of an interagency team with one that does not provide the necessary agreement on a common, underlying value statement.

Example A.	*"To work in partnership with public and private agencies, advocacy organizations, individuals with hearing and vision impairments and their families to develop and promote appropriate accessible programs and services through a coordinated service delivery system."*

Example B.	1.	*We believe in the right of persons who are Deaf/Blind-Multihandicapped to live, work, play, learn, worship and experience life wherever they choose, regardless of severity of handicapping condition. To realize these goals, an individual needs and deserves to participate in society to the fullest extent possible.*
	2.	*We believe that persons who are Deaf/Blind-Multihandicapped have the right to have equal opportunity to make choices, to have access to services that will maximize their potential, and to receive dignity and respect.*
	3.	*We believe involvement of the consumer and his or her family must be the dominating force behind any effort on behalf of persons who are Deaf/Blind-Multihandicapped.*
	4.	*We believe planning for life achievements should be based on the needs and goals of the individual who is Deaf/Blind-Multihandicapped, rather than society's perception of those needs and goals.*

Example "B" is a more useful statement of philosophy/values because it articulates beliefs and values which enable an interagency team to develop client-oriented, value-based transition goals and activities. Such a statement can then provide the "backdrop" against which a team can measure every goal, every activity to see if they mesh with the articulated values. If they do, the team can proceed with confidence that interagency actions are consonant with the group's values. Individual members will know that assigned tasks do not stand in a vacuum, but are tied to a common, agreed-upon end. This reinforces both the ties of individual members to the group and the group's need to rely on each other's expertise if it is to be successful in reaching value-based objectives.

If goals and activities generated do not meld with the team's philosophy/value statement, or if no consensus emerges, the group will recognize the need to pause, step back,

and reevaluate either the goals and activities or the philosophy guiding the group. In other words, the philosophy/value statement offers a litmus test, to ensure that the interagency team stays on target, avoids goal-displacement, and is working on a continual basis with a general consensus as to what drives the group and why. TAC'S experiences with state interagency teams suggests that the development of a philosophy/value statement, as one of the initial steps of a newly formed group, is critical for an interagency group. Minimally, there are two clear benefits.

First, the process of creating a philosophy/value statement helps to generate team solidarity. As members interact and share, filling flip charts with their different ideas, values and viewpoints, they are also building mutual interests and respect for each other and for the team. Each member begins to feel ownership in the team. The synthesizing and consolidation of ideas results in one value statement, one every team member is instrumental in creating. Yet the final product is the result of a group decision-making process, binding each team member to a common end.

Second, the philosophy/value statement helps to answer the question, *why do we as an interagency group exist?* It forces members to arrive at some mutually agreed-upon conclusion as to what will drive the group. An articulated philosophy affords the team something concrete, to which it can go back and refer, whenever feeling the need to regroup or reunite when differences arise, or whenever a sense of floundering or stagnation occurs. The philosophy becomes a steadfast buoy, to which an interagency team can cling for a while, in order to regroup or realign itself with its mission. Of course, this is not to say that the philosophy/value statement itself will *never* need review or alteration.

GOAL SETTING

Once a philosophy/value statement is established as the undergirding for an interagency group, the determination of specific goals and means to achieving those goals becomes an easier task. Setting clear, measurable, attainable goals, while facilitated by the existence of a group philosophy, is still a course fraught with potential obstacles.

Interagency teams must continually remind themselves that while the interagency process is indeed a *process*, it should be one leading to a tangible outcome, in this case to measurably enhanced transition services for persons with deaf-blindness. Yet, what is the product that comes from this process? For example, are meetings spent reviewing, editing, revising a transition plan? Who is using it in the field? Who is helping to publicize its availability? And, most important, *to what end*? Interagency teams want to be doing more than setting the time and place for the next meeting. When that occurs, the process tends to become the product and *goal displacement* -- where *how* a team does something becomes more important or valued than actually getting it done --- is a distinct possibility.

Goal displacement is a problem common to many organizations, but it is a pitfall toward which interagency teams must be particularly vigilant. One way to steer clear of goal displacement is to work with a strong statement of values and to derive from that a set of clear, measurable goals, from which specific means to those goals can be logically inferred.

All teams exist for a reason, all teams have general goals aimed at reaching a particular end. For example, if a team is concerned with the issue of crime, its general goal might be a lower crime rate; if the problem is education, the goal might be well-educated citizens; if the problem is the homeless crisis, a goal might be no homeless or fewer people living on the streets. And, if an interagency team's problem is deaf-blindness and transition, its goal might be more individuals with deaf-blindness living a quality life integrated within the community.

An obstacle often arises when a goal is vague or inconsistent or is not sufficiently clear and measurable so that one can make a reasonable, unambiguous judgement as to whether the desired state of affairs has actually been brought into being (thus avoiding goal displacement). These ends are called operational goals, goals that can be measured against an actual state of affairs (Wilson,1989, p.34). Some teams have no difficulty in delineating operational objectives. For example, if NASA has a goal of exploring space, landing persons on the moon makes sense. It is a tangible end -- NASA will know when it is reached -- and it clearly fulfills the general mission of exploring space. Other organizations, however, have a tougher time figuring out operational goals. For those in education, what is "an educated child"? For the State Department, what is a "good foreign policy"? How in these latter two cases do we make a reasonable, unambiguous judgement as to when the goal is realized? What does realization of the goal *look* like?

Interagency teams must grapple with problems like these when planning transition services. But if a philosophy/value statement is in place, if goals can be carefully and clearly articulated, and if team members agree on what they mean, interagency teams will be able to observe clients actually enjoying a comprehensive array of services offering those individuals a quality life. Specific goals may then include an emphasis on increasing community living options, supported employment opportunities, or recreational/leisure activities. With goals such as these, an interagency group *will* know when it has achieved an end consistent with its reasons for existing. Those ends will be measurable and tangible -- there will be a "product," something comparable to the desired future state of affairs originally identified by the team.

Whenever the focus can be maintained on individuals and client-related outcomes, the less likely it is that goal displacement will sneak up on a group, and the less likely it is that interagency teams will stray from the consensual or values agreed to at the outset. Setting

clear, measurable, client-focused goals is therefore a critical aspect of the interagency process. As tangible outcomes result from collective efforts, as successes mount, interagency morale is kept high (even though the number of actual client's cases addressed is small), and group solidarity is enhanced by working toward a common end. The focus remains on individuals, as it should be, yet systemic change may be slowly emerging. Each individual involved in the interagency process is important, yet the "team" is equally important to achieving the general goal. The end result is what matters, and means do not become ends in themselves.

The clearer, the more measurable the stated goal, the better the chance of achieving it -- a simple point, perhaps, but one that needs to be stressed. This is not to say that roadblocks will not be encountered; they surely will. But interagency groups concerned with transition and deaf-blindness are not as bad off as some organizations. Yes, the Bureau of Public Roads is supposed to build and maintain highways and it does, and yes, the Postal Service is supposed to deliver mail and it does (albeit in both cases, quite slowly, often). But, for example, the National Institute of Health does not yet have an answer to the AIDS virus. We *do* know how to operate a community home, we *do* know how to arrange for supported employment, we *do* know how to identify quality-of-life recreation indicators -- and our expertise and knowledge is increasing every day. As a result interagency teams working on these issues may still encounter many constraints, but they are not working in a philosophical or technological vacuum as long as collaborative transition efforts occur.

When an interagency team's goal-setting process emphasizes tangible, measurable goals accompanied by realistic timelines, when goals are set around individuals, when goals necessitate the involvement of every member of a team, when specific steps and strategies are clearly outlined and reviewed on a periodic basis by all team members -- then the chances for success are high. The process of setting goals and assigning tasks is a key to motivating the

interagency team members and to ensuring that the group retains its focus on enhancing services for individuals with deaf-blindness. It is important to remember, too, that goals will need constant honing, readjusting, and realignment, which is why building into the interagency process regular intervals to stop, reflect and reassess progress is so necessary.

This is one approach to the interagency goal-setting process; no doubt it is not the only one. But it is one with a proven track record of success. Table 3.2 presents the steps in successful and collaborative transition goal-setting.

TABLE 3.2

SUCCESSFUL GOAL-SETTING HINTS

1) Develop a philosophy/value statement.

2) Decide upon 3 - 4 operational goals, consistent with the team's philosophy.

3) Design operational goals with realistic time frames and measurable outcomes.

4) Identify clients or "case studies."

5) Assign a task related to goals to every team member to work on between meetings.

6) Structure periodic reviews to assess programs, to check goals against values, and to track obstacles or snags.

7) When a goal is reached, celebrate - as a team!

FOCUS ON INDIVIDUALS: A CASE STUDY APPROACH

Maintaining an interagency group's focus on *individuals* is another factor identified as critical to success. State teams which have embraced this approach note that it keeps the team's momentum moving in the direction of client-oriented outcomes and can help to keep goal displacement (where means become more important than ends) at bay.

Moreover, the focus on individuals can be a powerful, motivating force, pulling together diverse agencies and interests around a common, humanistic end. The stimulating effect that comes from a focus on actual people is one that cannot be overstressed. To put it in another context, think for a moment, of the Vietnam memorial in Washington, D.C. Think of the massive, smooth slab of black granite and ask yourself what makes that memorial so powerful, so memorable, such a profound expression: Is it the name after name after name of individuals etched into that stone? An image, a statue does not evoke the same response, does not provide the same degree of focus and effect. State interagency teams have expressed a similar sentiment materializing from a focus on clients. Giving a name, a face, to an individual with deaf-blindness helps to make the work experience of interagency team members more real, more connected. And it keeps the emphasis where it should be -- on delivering services that are value-based, that reflect a quality life-style for individuals with deaf-blindness.

A case study approach to interagency problem-solving is one method by which an individual focus can be maintained. The team identifies one, two or as many as five clients at various stages of the transition process and develops a "case study" around the client including the following types of information:

- where is the person now?
- where would this person *like* to be?
- what array of services is now available?
- what is missing, where are the service gaps?
- how can we, as a team, work to close these gaps, fill in these cracks?
- how can we improve, enhance, or develop the transition services *this person* needs to lead a full quality life integrated in the community?

Working in this way, an interagency team can identify common snags, or gaps in service delivery and isolate system issues that need to be addressed in order to begin the process of effecting change in transition services. At the same time, the interagency team

maintains a focus on the individual and on tangible, measurable outcomes for persons with deaf-blindness.

When interagency teams operate within these parameters-- focusing on a small number of clients, identifying the available array of services, locating gaps in the system, figuring out collectively how to resolve problems -- the process of effecting transition systems change will have begun. If services can be enhanced for two or five or ten clients, the system can be responsive to larger numbers of clients as well. Change is eased into the system through an approach referred to as "backward mapping" (See Chapter 5), a process less problematic for all involved and one where change has tangible, favorable outcomes for clients -- *because the focus for change begins and ends with individuals.*

KEY PLAYERS: THE PARENT CONNECTION

An interagency team, by definition, needs to be comprised of key actors involved in the transition of youth with deaf-blindness to adulthood. Education, rehabilitation, mental retardation, mental health, developmental disabilities personnel, for example, must be represented on a team aimed at success. Along with such service providers must be another critical constituency -- parents. While TAC strongly believes individuals with deaf blindness should also be equal members of interagency teams, this section will focus exclusively on parents, reflecting TAC's objective of enhancing parents' leadership and advocacy skills.

Parent involvement as co-equals with other interagency team members is a vital ingredient to interagency success. Parents bring a unique perspective to the service needs of individuals with deaf-blindness. They and their children have experienced the strengths and weaknesses of services delivered at the point when it counts most -- where services and the client meet. Parents are often the catalyst in moving interagency groups forward, in keeping

the perspective and goals of the team client-oriented. As noted elsewhere, a focus on *real* individuals is another key to interagency success, and parents provide the push and constant reminder that the team exists to help *real* persons to enhance the quality of *real* lives -- not just the abstraction of a person or a life.

Parents, too, are quick to cut through more theoretical discussions of whether or not this referral form, or this type of transition plan, or this interagency cooperative agreement is the best *way* to proceed, to ask about the *application* of such means to the end that brought the group together in the first place. They can ask: How is this going to bring about the delivery of more comprehensive and coordinated services molded to the needs of individual clients? This role is one which comes easily to parents -- often, they have been doing it for years in different settings and it is one with which they are comfortable. They can ask the question repeatedly -- how will the implementation of this have a positive, tangible effect on a person with deaf-blindness? As it is all too easy for any group or committee to get side-tracked with secondary issues, or means unrelated to ends (e.g., goal displacement), parents have proven to be an invaluable source of guidance and leadership for keeping an interagency team's focus on direct client-related goals.

In addition, parents can do things agencies cannot. For example, they can more easily engage in advocacy, where government personnel are often stymied. Parents are free to lobby public officials, appointed or elected, without constraint. Whereas an agency professional may not be allowed by law to lobby a legislator, parents can simply remove their hats as interagency team members and replace them with ones labeled parents. This allows them to go places and say things without fear of their actions being interpreted as one of agency self-aggrandizement, or lobbying.

In fact, agencies can offer parents insight and concrete tactics for how to advocate best in political settings to which they may be unaccustomed. And, parents can offer service providers insight and tactics on how best to present the case for increased or realigned resources to higher administrators and elected officials based on their own unique perspectives. A symbiotic relationship develops, one where parents move in areas service providers cannot, and agency personnel move where parents do not have the same degree of access. But both sets of actors do so with a better chance of success because of the enhanced sensitivity to the constraints of each other's capabilities and capacities. This comes, in large part, from serving together as co-equals on an interagency team where common, consensual goals have replaced conflicting ones. Partnerships replace adversarial roles, and as a group the knowledge that the whole is greater than the sum of its parts is reinforced.

States which boast not only a strong interagency team, but also an independent parent advocacy group possess even more potential for success. When parent groups and interagency teams work in concert, they can become a formidable unit. In some states, parent groups have triggered the formation of a state interagency team; in others the presence of such a task force has provided the spark for the formation of a parent advocacy group. Either way, the existence of an external advocacy group comprised of parents and/or consumers, when working in consort with an interagency team, has proved to be an asset whose dividends can only help those both groups seek to serve -- individuals with deaf-blindness.

The number of parents involved in a state's interagency effort need not be large -- a point that needs emphasis. Parent representation on a state interagency team has ranged from one in Illinois to two in North Carolina to four in Missouri. Other states, Minnesota and Arkansas, included at least one consumer with deaf-blindness in addition to parents of children who are deaf-blind. The point is that there *is* a parent and consumer perspective

represented on any interagency team. Indeed, this participation is a necessity for interagency success. Once the initial mutual suspicion and questioning of commitment on both sides is overcome (and this occurs quickly), the benefits multiply and the satisfaction of working as a team with people who appreciate each other's position dominates. Adversarial positions will emerge in the interagency process (they always do in such a diverse group) -- but they become secondary issues, and the basis of common goals allows for their discussion and resolution in terms that are distinctly reinforcing and positive.

TAC's experience shows that having a parent as chair or co-chair of an interagency group can only facilitate the process of team development, help maintain a focus on individuals, and lead ultimately to the achievement of those objectives for which the interagency team exists. (Other strategies for increasing parent involvement are discussed in Chapter Four).

TEAM EMPOWERMENT

A focus on individuals leads naturally enough to a case study approach; a case study approach lends itself to collegial and collective problem-solving and decision-making efforts by an interagency team. As results are achieved and successes realized, there is yet another coincidental benefit that is a salient characteristic of effective interagency work -- belief in one's ability both as an individual and as a team to effect change.

The issue of empowerment is discussed throughout this monograph. It is worth noting here the important impact on an interagency group of resolving problematic issues for even one client with deaf-blindness. The importance of *efficacy*, of *self-empowerment*, of believing we can, through our efforts as a *team*, achieve substantive results can be a powerful motivating device to encourage future, more encompassing, client-oriented outcomes. And

this is why it is so important to start out with small numbers, perhaps two or three clients -- to look at 25 or 30 or 100 clients can be overwhelming. But as small successes are achieved, as barriers are overcome, as problems are solved, the next obstacle does not loom so high and does not seem so hard to overcome. State interagency teams are, in effect, building on success. As success builds on success, first with one client, then two or 10, the team starts to coalesce, the team begins to effect systems change, clients benefit in measurable ways and the sense of empowerment is reinforced.

Interagency teams need to stop periodically and pat themselves on the back, to take the time to acknowledge successes, to feel the pride of their accomplishments. It is this sense of achievement, of knowing individuals can effect change that provides the motivation, the momentum for interagency groups to move forward toward lasting and positive improvements in quality transition services for persons with deaf-blindness. This empowerment comes from not just thinking you can do it, but from actually *doing* it -- the "little engine that could" syndrome. Before you can understand and effect change, you must experience it. Interagency task forces provide just that forum. One way to begin is to identify common goals so that change is a collective, inspiring team effort.

INTERAGENCY TEAM BUILDING: AN EVOLUTIONARY PROCESS

The development and maturing of an interagency team is, without question an *evolutionary* process. Rarely will a group of individuals coming from disparate backgrounds meet for the first time and have a "team" in place. Each participant, whether service provider, parent, or private vendor, will bring to the interagency process different purposes, goals, and views of critical tasks. Moreover, when dealing with persons within one's organization there are shared values, an ethos, that most members recognize and accept. Such is not usually the

case, at the outset, for an interagency group. Communication is, therefore, more complex and less automatic among interagency team members until comfortable routines, similar "language" and shared values/philosophy are developed.

The type of communication and interaction necessary to reach goals will get developed and honed over time, however. Because there are so many agency and non-agency representatives involved by necessity in the provision of transition services, there will be "turf" issues to overcome. Part of building the team will involve confronting turf issues head-on, putting them on the table, acknowledging their existence. One way to get around sticky problems of this nature is to encourage the team to work on identifying commonalities and consensual, achievable goals that will lead to client-oriented outcomes, avoiding conflictual objectives leading to protracted negative discussions of what the team and/or individual members *cannot* do.

The identification of common ground can be facilitated by the development of an interagency team's philosophy/value statement, by information sharing sessions aimed at orienting the group to each member's organizational background, and by engaging in group problem-solving exercises. As the team begins to identify and work toward achieving general and operational goals, as it begins to address issues revolving around real individuals, the "team" will begin, naturally, to evolve. Participants will be experiencing that what the team as a whole can accomplish is more than what any one member could individually attain. But this does take time and does require patience. By keeping all members actively engaged at and between meetings by designating specific assignments and time frames, by rotating meeting locations and minute-taking responsibilities, by periodically measuring team progress toward goals, a sense of ownership is built in this "new" organizational entity, the state interagency team.

As group accountability is stressed, a sense of cohesiveness and a sense of team identity and commitment to common ends will grow. And when groups get stuck, as they will, the newly developed sense of being a "team" will prove beneficial to keeping the group on track. Innovative special projects can be quite useful when groups do feel bogged down, or when solidarity seems to be cracking as a result of working on some particularly intractable problem. Special projects can assist with retaining a sense of momentum and offer a respite from the usual proceedings, reinforcing the idea that working as a team can be both "fun" and productive.

The structured periodic reviews, too, offer not just the opportunity for critical assessment of works in progress, but also the chance to look back and applaud recent accomplishments, to engage in a little bit of "patting yourself on the back". These reviews allow members to take pride and satisfaction in what they have achieved through commitment of a significant amount of their time and effort to what is, for many, a voluntary assignment to a second organizational home, the interagency task force.

To draw an analogy, building an interagency task force is not unlike building a successful baseball team. When a previously unheralded minor league baseball team, the Utah Trappers, set a new pro-ball record of twenty-nine consecutive wins, a lot of people scoffed, "how lucky." Yes such success probably does take some luck; but it also takes a lot of skill and a lot of practice and a lot of playing alongside each other over a period of time. It comes from habit, from getting to know each other's quirks and strengths and weaknesses, it comes from false starts and small winning streaks, it comes from *teamwork*.

STRUCTURAL PROCEDURES AND GUIDELINES

Interagency teams at all levels of government and in all stages of the interagency process can benefit from developing a statement of operating procedures and guidelines. These guidelines can address such potential "problem" areas as who will run the meetings, where a group meets, who will sit on the task force, and what goals or objectives are priorities in a given year. Listed in Appendix B, at the end of this monograph are a few of the more common topics usually included in an interagency team's operating procedures. All members should possess a written a copy of the team's operating procedures, guidelines, philosophy statement, committee assignments and membership, and the year's action plan, consisting of specific activities, persons responsible, timelines and evaluation/monitoring dates.

SUMMARY

While following these guidelines in no way assures success, TAC's experience indicates that they do go a long way toward avoiding problems in the interagency process. Issues such as personality conflicts, turf bickering, membership turnover, overcoming bureaucratic inertia, local implementation obstacles, absence of a lead agency, and differing definitions of population will, of course, crop up. Whey they do, the presence of some or all of the critical factors delineated in this chapter will provide a means of coping with the issue.

The elements discussed in this chapter are not meant to be all-inclusive or to constitute the nuts-and bolts of a demonstrated, ideal model of collaborative transition efforts. The indicators described do, however, offer common threads which an interagency team can use to begin to weave the complex fabric of which successful interagency coordination is formed, resulting in enhanced transition services for individuals with deaf-blindness.

CHAPTER 4

PARENTS: VITAL MEMBERS OF THE INTERAGENCY TRANSITION PROCESS

Jane M. Everson
Martha G. Michael

There is just no way I can tell you how much the interagency group has meant to me. Before I felt my daughter couldn't make it, now I expect her to achieve. That's why I share my enthusiasm; it has meant so much. --a parent

Over the past six years, TAC's experience with state interagency teams has shown parental involvement in the interagency process to be of critical importance to a team's success. A variety of state interagency teams have demonstrated ways in which the parent member(s) of a team stimulated the rest of the team to focus on transition outcomes for target individuals. The parent members of most of the 18 state interagency teams involved in cohort training activities have become outspoken leaders, not only for their own sons and daughters, but for other youth with similar transition support needs. Because of these experiences, TAC strongly recommends that state interagency teams include parents in their membership. Although few interagency teams to date have included individuals with deaf-blindness as members, TAC recognizes that these individuals can also relate their personal experiences to interagency teams, and whenever possible, should be included as team members. The purpose of this chapter is to describe the contributions parents have made as members of state interagency teams, and to describe strategies for initiating and fostering their involvement.

BENEFITS OF PARENTAL INVOLVEMENT

Interagency teams realize numerous benefits from parental involvement. And parents themselves also share in these benefits. First, parents and individuals with deaf-blindness have direct experience with the delivery systems that are providing transition services and can therefore best represent a consumer's perspective. These experiences are the impetus for planning around transition issues affecting the lives of specific individuals with deaf-blindness. As significant and co-equal members of state interagency teams, parents focus the attention of other team members on real individual's transition needs as opposed to relying on fictitious or theoretical assumptions about what is needed. Individualized consumer-specific goals and activities are thus more likely to be developed.

Second, the real-life testimony of parents and consumers as to pitfalls or benefits of current service delivery systems builds team cohesiveness. The experience of fighting for transition services is not uncommon for parents. These advocacy experiences and skills are helpful to the team, and may subsequently strengthen the team as it focuses on individuals and their current transition services and needs. Several parents from state interagency teams have stated that they are not solely involved for their own children's sake, but also for the purpose of increasing and enhancing services for all individuals with deaf-blindness and other severe disabilities. In representing their own children and others who share similar problems with service delivery, they relate anecdotes that elicit feelings in all members of the team that can be shared, such as disbelief, sorrow, anger and joy. When members share these feelings they grow together as a team. As a team, they may need to "go to bat", just as they have done in the past, for the individual cases the team has chosen. The team's resulting advocacy further enhances the cohesiveness of the team and gives an avenue for the team to effect individual lives as a unified whole, and as a result celebrate the successes of such advocacy. Parents ideally represent all other individuals with deaf-blindness, and continue to remind the team

of its values and vision -- community-integrated employment, living and recreation outcomes for youth with deaf-blindness.

TAC has worked both with teams that have parents as members and with teams that do not have parents as members. Lack of parental involvement has resulted in more limited consumer outcomes and more limited interagency team efforts. Those teams including parents as decision makers and co-members of their teams have proven to be more effective in stimulating service delivery change at the individual, local, regional, and state levels. When parents are involved as team members, it is not unusual for policies and procedures revised or developed for individual consumers to be expanded regionally or state-wide for larger numbers of individuals with deaf-blindness.

By observing the evolution of various state interagency teams, TAC has identified numerous parental contributions. For this reason, TAC now requires parent membership *before* state teams can be included in cohort training activities. Table 4.1 describes parental contributions to the interagency transition process. Each of these contributions will be discussed in detail in the next section of the chapter.

TABLE 4.1
PARENTAL CONTRIBUTIONS TO INTERAGENCY TEAMS

1) The knowledge of deaf-blindness and service delivery experiences held by the parent or consumer;

2) The personal dedication of the parent and consumer for enhanced of transition services;

3) The ability of the parent or consumer member to maintain the focus on the needs of individuals;

4) The ability of the parent or consumer to serve as a liaison for other parents or consumers;

5) The ability of the parent or consumer to advocate in political arenas;

6) The complimentary nature of the parent-professional partnership.

PARENTAL CONTRIBUTION TO THE INTERAGENCY PROCESS

Unique Perspective

> *A parent has experience in the difficulties and unique needs of deaf-blindness, knows the system in their state and brings to representatives of agencies the family focus and individual need of children. - a parent*

Parents experience directly the effects of what policymakers create, and their knowledge of what works and does not work in transition services will be different from the professional members of the team because of this role. As a result, parents can offer knowledge about deaf-blindness and the diversity of desired outcomes and transition supports needed by their child to ensure their full or partial participation in educational, residential, vocational, and recreational settings.

By offering this unique experience and knowledge to the other members of the team, parents extend the team's knowledge-base and the common philosophy or value-base is expanded. The ultimate result of this common understanding, is the cohesiveness of the interagency team as it begins generating goals and activities.

The cohort training provided by TAC seeks to enrich the participatory level of the parent(s) on the interagency team, by providing time for parents from all states to share their unique perspectives with one another as well as with the rest of the professional participants. By encouraging parents to share their perspectives with parents from other states, their confidence and ability to share their desires, needs, and experience with their state teams is increased.

An example of this is occurred within the Wisconsin state team. In the beginning, this team did not have a parent member, and by its own admission, was lacking the parent's perspective. Eventually, the team realized the potential benefits of a parent member and invited a parent to join the team. The parent chosen was the mother of the first individual

on whom team activities focused. The team helped with the transition of the young adult from the state institution back to his home county. The parent's shared perspective was the catalyst in moving the team to action as the team began to realize the confusion and pressure families face in addressing transition issues. This realization may not have been made without the parent's participation. The successful outcomes of this team's efforts resulted in a stronger and more cohesive team and demonstrated a successful transition model that was expanded to other individuals with deaf-blindness throughout the state.

Dedication

> *I feel that I am preventing other children from "falling through the cracks" by sitting in the interagency task force. I see my role and responsibility as seeing that the needs of all deaf-blind children are met. -- a parent*

As members of an interagency team, parents are more than willing to help, at all costs, if they perceive the work as potentially enhancing services and outcomes for their children. Their dedication to changing the status quo is demonstrated by their presence and participation at team meetings, and the countless hours they work or travel, frequently without financial compensation. The dedication shown by the parent members sets an example for the rest of the team members who may also feel at times their time and energy serving the team are not compensated. In addition the parent's dedication to changing the system, in pursuit of best services, can assist in motivating the team to keep its philosophy and goals alive when change is slow to occur.

TAC encourages and empowers parents to stay involved by providing them with leadership training and by using parents as paid consultants to share their experiences with other states. By paying parents to share their experiences and expertise, they are reinforced for their efforts and dedication, and can grow as effective leaders within their own state as well as the nation. By providing parents leadership training, parents from newly formed

teams are able to listen and share with "veteran" parents.

In Ohio, for example, the parent member of the team travels more than three hours each month to attend state interagency team meetings. TAC provided this parent financial assistance to attend a leadership training on personal futures planning. This training enabled her to conduct a personal futures plan in partnership with one of the professionals on her team for an individual selected by the Ohio interagency team. This training reinforced her dedication and commitment and provided her with a set of skills not possessed by the other professional members of the Ohio team.

Focus on Individual Needs

> *The family is the only comprehensive advocate for meeting their child's needs. Every task force needs family representation. -- a parent*

As discussed previously, parents can assist the interagency team in focusing on outcomes for real individuals by sharing their own experiences and dreams for their own children. The real life issues experienced and shared by the parent inject poignant realism into the team's effort at interagency collaboration. TAC has continued to emphasize an individualized case study approach in every cohort training workshop. More recent training activities include examples from state teams who have been successful using this approach. For example, the impetus for Missouri's state interagency team focus on individuals enabled them to facilitate the transition of a young women with deaf-blindness from an institution to a home in the community. The development of a training videotape combined with presentations by this parent have made a powerful training tool demonstrating the importance of parent involvement and the case study approach.

The entire interagency team benefits from focusing on individual lives. Having parents present not only keeps the team focused on reality by using an individual case study approach, but also assists in evaluating consumer-specific outcomes. For example, since they

are not bound by any agency, parents can provide the evaluative component to this approach by asking questions such as "*What tangible differences were achieved for this individual*?" or "*How will this goal or objective directly effect the lives of other individuals with deaf-blindness*?"

In several states, parents guided the evaluative component of the interagency team's activities. This was most evident with the Wisconsin interagency team, where the parent helped to change the team's approach with parents and families. Her son was one of the individuals selected by the team, and through this experience she was able to provide valuable, evaluative feedback to the other professional team members, which altered the way they approached parents and families with their future cases and later state-wide efforts.

Liaison

> *My role there is to represent parents and my parent group, in other words, get information from them that will be helpful to parents. -- a parent*

As representatives of other parents and other consumers, the parent member of an interagency team will in many cases serve the role of a messenger, taking and bringing back information from his/her constituency. In many cases, the parent member represents an already existing and organized parent group. In other cases, because of their participation on an interagency team, parents may form or join such an organization in order to disseminate what they have learned with other parents. Literature on parents indicates that parents can best share information about team activities with other parents. In this way, many more parents are strengthened and empowered.

Agency representatives may not have contact with individual parents or consumers. Therefore, when active parent involvement and support is needed for team activities, this messenger role may become critical to the interagency team process.

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Agency representatives may not have contact with individual parents or consumers. Therefore, when active parent involvement and support is needed for team activities, this messenger role may become critical to the interagency team process.

TAC cohort training activities often include training in parent leadership. As a result, a number of states have formed parent groups as offshoots of the interagency team process. Other parents have acknowledged that what they learn at interagency team meetings has been extremely valuable to them in advocating for transition services for their own children. For example, one parent learned that her child could be mainstreamed if she so desired, and in her role of messenger she asked for these services. As a result of her efforts, her child and six others were mainstreamed into a local public school. These and other activities were a direct result of parent interagency team involvement.

Advocacy

> *Parents need to help others to understand that if their agency isn't meeting its obligation, their "piece of the pie," the child and the agency both suffer. -- a parent*

As private citizens, not paid by state or federal funds, parents have political clout that can be beneficial to the interagency team's pursuance of its goals. With no restrictions placed on them, parents have the ability to lobby legislators, call upon governors and state officials, and organize other parents to appear and testify at the state legislature in order to stimulate state-wide systems change. This potential avenue for systems change can be very useful in the interagency team's implementation of action plan goals. Goals and activities set by the interagency team that require more funding or policy change, and therefore rigorous legislative attention, will need parent involvement to help with this process.

TAC provides training that encourages parents to speak out and become proactive in seeking services for their children. Direct results of this have been letter-writing campaigns, parents who assist in legislative efforts, or in one state, the development of an advocacy relationship with the governor. For example, a parent from one Northwestern state has been asked to serve on a variety of state and national advisory boards both because of her abilities as a speaker and because of the national parent contacts she has developed through TAC

workshops. She has become an outspoken advocate for her child with deaf-blindness and other youth with severe and multiple disabilities.

Complimentary Roles

> *The task force has been fantastic for our state in what we have been able to accomplish. As a result of being in the group I have met some neat, dedicated people who want to do their jobs well, and they get great satisfaction when we work together and the job is done well. -- a parent*

The roles of agency persons and those of parents are complimentary and can result in strong partnerships. What cannot be accomplished by the parent, such as advocating within an agency, can be accomplished by a professional member. And, what cannot be accomplished by a professional member, such as lobbying political officials, can be accomplished by the parent. Parent-professional partnerships are this viewed as an important outcome of TAC's cohort training activities.

By working together on a state interagency team, and sharing the responsibility of effecting change at an individual and state-wide level, each team member learns of the other's strengths and weakness, what kinds of tasks can be accomplished by whom and what type of supports are required. In this way, members develop skill diversity and interconnectedness which are important qualities for a state interagency team. These qualities give the team the potential to address any collaborative transition issues that may arise.

TAC encourages the development of parent-professional partnerships by assisting parent and professional team members with identifying clear roles and responsibilities, building transition service knowledge and skills, encouraging parents to chair or co-chair the interagency team, by encouraging intra-state communication at cohort meetings, and by providing technical assistance to state teams.

SUMMARY

HKNC-TAC believes the importance of including parents and consumers in collaborative transition activities cannot be overstated. Parents' dedication and participation, can be invaluable in helping a state interagency team focus on specific transition issues that effect individuals with deaf-blindness, and in providing evaluative feedback to the team. Their roles are varied, but generally compliment those of professional team members. When provided training and technical assistance, they can become strong advocates and leaders in their state interagency team's efforts to strengthen the quality of transition services for individuals with deaf-blindness. In turn this leadership and advocacy enables the team as a whole to be more effective and strong in their collaborative efforts.

> *The cohort meetings are like a "shot in the arm". They inspire people to do so much better. It's good to meet the others from different states. We keep in touch between meetings. We come away with a lot of pride, but also knowing that we can do still better. -- a parent*

CHAPTER 5:

COLLABORATIVE INTERAGENCY TRANSITION: IMPLEMENTING THE PROCESS

Patricia Rachal

Using the interagency process to enhance the delivery of transition services to persons with deaf-blindness often highlights weaknesses or gaps at various points in service delivery systems. In most cases, interagency teams meet because of the assumption that some alteration in or refinement of the systems providing transition services is necessary.

Meeting with an interagency team, representatives of players from five, six, or more agencies, and addressing the need for change in transition services can present a formidable obstacle from the outset. Interagency teams might come to the conclusion, and rightly so, that the resources needed to bring about community-integrated adult outcomes for persons with deaf-blindness are not available or accessible to the group. For example, the team's members may not possess the power to allocate or reallocate funds or personnel to mainstream youth with deaf-blindness from a state residential school to a comprehensive local school, or hold the hierarchical authority needed to implement new supported employment policies or procedures. Discouragement may quickly ensue, heightened by the sense of frustration stemming from recognition both of the need for change and a feeling of powerlessness to effect that change.

There are state interagency teams, bold of nature, which do decide to press ahead with development of state-wide systems-change plans for transition services. Mapping out such complex blueprints is time-consuming and politically intricate, especially if a group is informal in structure, without executive or legislative mandate. In one state, drawing such a plan took two years, and after five years was still being refined and revised, without one tangible outcome for a person with deaf-blindness observed. Goal displacement was clearly

evident in this case. This does not suggest such a top-down, systems-change approach will never work; it is simply TAC's experience that other paths to effecting change in transition services may be faster and more efficient for persons with deaf-blindness.

"BACKWARD MAPPING" AND CASE STUDIES: A BOTTOM-UP APPROACH TO CHANGE

What TAC has endorsed with state interagency cohort teams is an alternative method of identifying and addressing the need for change in transition services for persons with deaf-blindness.

The method for facilitating change is called "backward mapping" and was first advanced by Richard E. Elmore (1980). His model for successful implementation of policy change recommends looking at the "specific behavior at the lowest level of the implementation process that generates the need for a policy" (Elmore, 1980, p.604). Once that "behavior" is described, objectives aimed at a specific outcome are devised. Next, questions are asked about the ability of professionals to effect the target behavior, and what resources will be needed to effect the change or to implement the new policy. This model takes into account, at the outset, the ability of players and organizations to bring about change and involves those people who will be directly responsible for engaging in new or altered tasks in the planning process. Elmore believes that such a process of "backward mapping" assures a greater possibility of successful implementation because one is using the expertise and discretion of those closest to the problem in defining how to solve it.

With a top-down approach, issues and potential solutions are discussed first in the general and the abstract, then applied to test for efficacy and effectiveness. Solutions are based on general issues and general problems, driven by estimated numbers of clients who need general services, not by the special services needed by individual clients. With a bottom-

up approach, however, alterations to and adaptations of existing systems will have the advantage of key participants knowing in advance that such changes *will* have positive, direct, and measurable impact on the quality of life for individuals with deaf-blindness in transition. This occurs, in part, because the recommended changes *already* have been tested with a smaller number of individuals.

TAC adapted Elmore's model for use with state interagency teams, applying its central tenets for facilitating change in transition services for persons with deaf-blindness. TAC encouraged states to adopt a case study approach to begin to ferret out key issues and problems, to close gaps and solve problems. From a small number of persons with deaf-blindness, changes are backed up through the system to the point where larger transition procedures can be effected.

As discussed in Chapter 3, TAC strongly believes that for interagency groups to maintain a focus on individuals and on measurable, community-integrated client outcomes, a case study approach proves beneficial. Interagency teams begin by selecting a manageable number of clients (two to five cases), and work with these "case studies" to determine what would best constitute a comprehensive array of transition services *appropriate for each individual*. Teams then focus on what services are now in place, what gaps need to be filled and how the interagency group can work in a collaborative way to improve, enhance, or develop the transition services necessary for each person to live a full, quality adult life. This process of adapting systems to the person begins with a small number of clients. In this way, teams perceive change as feasible and less intimidating while simultaneously developing a sense of empowerment.

Moreover, a case study method insures that the goals and activities of the interagency team remain concrete and client-oriented, with a bottom-up approach toward improving

systems, supplanting the more commonly encountered top-down approach to systems change. Hence, those seeking the changes encounter a much greater potential for successful implementation because the changes are not being imposed from the top-down in a context absent of real-life experiences of specific individuals. Rather, they will have emerged through a process of looking first at an *individual* and what makes sense for that person. Adaptations occur, then, generally and appropriately, with the collective participation and acceptance of those in the system who provide services *and* those who receive the services from the system.

Wisconsin: Backward Mapping and Transition Services

Wisconsin offers an example where an interagency team is successfully engaged in the "backward mapping" approach to systems change. Wisconsin, a member TAC's second interagency cohort, has been working for the past three years to adapt local and county service systems to the needs of individuals with deaf-blindness.

Four transition-age individuals with deaf-blindness were initially targeted by the interagency team in an effort to supply value- and community-based options affording these persons a quality life integrated in the community. TAC provided general training through three cohort workshops and contributed specific technical assistance in the state aimed at enhancing the expertise of local service providers in coordinating and molding the service system to fit the specific needs of individual cases.

By employing a case study approach with its focus on individual consumers, and guided by the team's philosophy statement, Wisconsin is now serving a number of persons with deaf-blindness (some of whom were in institutions), in their home communities, where they live and work and enjoy recreational activities.

As keys to its success, members of the interagency team stress the importance of individual commitment to the group's common mission and philosophy, and the importance of its ability to work collaboratively to identify state and local resources needed for the development of quality life-styles for individuals with severe disabilities. The interagency team has also worked hard to empower local service providers with the flexibility and "know-how" necessary to allow the system to revolve around the person, as opposed to fitting a person into an already existing system. As a result, Wisconsin is experiencing systems change at the county and local levels. The county level is where much power rests within Wisconsin (as is true in many other states) and where many key services meet the client. Therefore, it is a logical way to begin to effect change, and although the numbers are still small, successes are clearly evident. But as the Wisconsin team (and any other state interagency team involved in achieving significant, client-oriented change through "backward mapping") knows, this process is an evolutionary one and the need for coordinated, collaborative interagency endeavors continues.

PROBLEM-SOLVING TECHNIQUES

All interagency teams, at one point or another, will come across a particularly intractable issue that does not lend itself to easy solution. Whenever a team finds itself stymied, engaging in a structured, problem-solving exercise can be useful in providing the catalyst to move beyond the obstacle. TAC has used such devices to prod interagency teams in cohort meetings to develop detailed action plans built around client-oriented, value-based goals and to train the teams in general problem-solving techniques that can be used "back home" to address concerns specific to individual states.

One problem-solving strategy that TAC has found to be particularly effective is "Force-Field Analysis", developed by Kurt Lewin, (1951). TAC structured this problem-

solving tactic to consist of five components as summarized briefly in Table 5.1. The time involved can vary from a few hours to six to seven hours, depending on the number of players involved in the process and whether the process is part of a cohort workshop or part of technical assistance provided on site.

TABLE 5.1

PROBLEM-SOLVING THROUGH FORCE FIELD ANALYSIS

1) Identify the problem.
2) Identify the solution.
3) Identify driving and restraining forces.
4) Identify strategies to move toward solution.
5) Develop an action plan.

1) Identify a problem with which your interagency state team wishes to grapple.

In identifying the problem, interagency teams are urged to think about why the group exists in the first place, what values and/or philosophy drive the team, and to define that problem as clearly as possible. The team is asked to choose an issue over which the interagency team can have some large degree of influence. To identify, as a "problem," inadequate federal funding to programs targeted at persons with deaf-blindness gets the group nowhere fast and only enhances a feeling of inadequacy and powerlessness. The problem should also be stated in such a way that a successful outcome can be recognized and measured. For example, "the need to improve the delivery of transition services across all agencies in order to ensure that individuals with deaf-blindness be educated in and are able to live, work and enjoy recreation activities in their community" offers the opportunity to devise specific, client-oriented solutions to a perceived weakness in the service delivery system.

2) Identify a solution to the problem outlined above.

Interagency teams are asked once again to keep in mind their guiding values and to look at available data in terms of clients with deaf-blindness in their state -- e.g., where these clients currently reside, what types of employment options are available to them, etc. Solutions must be checked against the problem identified in step one, to ensure both that they directly relate to the problem and that they are tangible and measurable. This ensures that the interagency team will recognize achievement of the outcome. Consensus and clarity are two primary concerns at this stage of the problem-solving exercise. For example, given the problem noted in step one, a team might decide, by a specific date, to identify and implement a transition process resulting in two persons with deaf-blindness living, working, and participating in recreational activities in community-integrated settings based on the individuals' preferred life-style.

3) Identify the driving and restraining forces that will affect attainment of the solution.

This step is the core of this particular problem-solving strategy. Teams are asked to identify the *driving* forces, or those factors which will have a positive impact on achieving the solution, and the restraining forces, or those factors which can constrain or impede attainment of the solution. Kurt Lewin contends that when faced with a problem or situation we want to change, we encounter an initial lack of movement, a state of *Quasi Stationary Equilibrium*. This results from the tension created by two sets of forces, driving and restraining, that leave us stationary, or stuck, where we are, in the *present state*. However, if one or the other set of forces can be affected through the actions of the interagency team, movement will result. Hence, the state is only *quasi*-stationary because the *present state* can be changed by either reducing the restraining forces or increasing the driving forces. In other words, teams are not "stuck" with a particular problem -- it only appears that way; it is the

counter thrust of opposing forces, driving and restraining, that keep teams in a state of equilibrium.

In the problem identified above, driving forces that could help in reaching the solution might include a Medicaid waiver, deaf-blind discretionary monies, and state models for supported employment, combined with the personal commitment of interagency team members. Restraining forces could include such factors as the absence of a Medicaid waiver, eligibility procedures for supported employment programs, lack of interagency cooperation/coordination across agencies involved, attitudes that prevent use of "best practices" with transition services, the lack of a functional curriculum in the schools, and the absence of persons with expertise in personal futures planning.

4) Identify strategies to "unfreeze" the current state and solution of the problem.

To create change, or to "upset" the balance of forces and thaw the *present state*, the interagency team now needs to identify strategies that will have a strong impact on moving the group toward the solution desired. TAC's experience suggests that spending the bulk of *available* time on reducing restraining forces is most productive. This step is aimed at encouraging teams to isolate and focus on those forces likely to have the largest impact on positive movement toward the solution. This usually means more emphasis on what can be done to eliminate, or negate, the influence of restraining forces. Interagency groups are told to be creative and innovative here, but to retain their focus on factors that are within the control or sphere of influence of the interagency group. Driving forces will either have to increase dramatically or restraining forces decrease substantially for the *present state* to change and movement toward a solution begin.

For example, given the driving and restraining forces above, feasible strategies could encompass selecting clients for case study analysis, assigning a task force subcommittee to

investigate the Medicaid waiver, soliciting technical assistance for training in personal futures planning, and offering local programs inservice training on best practices for transition services (see Table 5.2).

TABLE 5.2
Applying the Force Field Analysis Technique

1) Identify the problem

- Enhance the transition process across all agencies
- Ensure that persons with deaf-blindness be educated in and able to live and work and enjoy recreation in community-integrated settings

2) Identify the Solution

- develop and implement individualized transition plans for target individuals
- 2 persons with deaf-blindness will live, work, and enjoy recreation in community-integrated settings within one year

3) Identify driving and restraining forces

Driving

- Medicaid waiver
- state models for supported employment
- personal commitment of interagency team members
- technology on transition services and "best practices"

Restraining

- absence of Medicaid waiver
- eligibility procedures for supported employment
- lack of interagency cooperation/coordination across agencies
- absence of persons with expertise in personal futures planning

4) Changing the forces

- select clients for case study analysis
- assign interagency team committee to investigate use of Medicaid funds and other Social Security work incentives
- solicit technical assistance for personal futures planning
- offer local programs in-service training for "best practices" for transition services

5) Develop an Action-Plan

Once strategies have been identified, the next step is to develop a detailed plan of action documenting each strategy:

- Which members of the team will be responsible for implementation?
- What timelines will be recognized and accepted for successful implementation of each step?
- What monitoring procedure will be adopted to check progress toward implementation of each strategy?
- What evaluation procedure will be adopted to ensure that the team is periodically measuring positive movement toward the goal and will recognize achievement of the goal (or solution) when attained?

This problem-solving exercise is, of course, but one of many that may be used by interagency teams to overcome inertia brought on by difficult issues the group is facing. TAC asks teams to work out each step in writing and to keep copies of the action plan to review periodically. In addition, it is of paramount importance that the team decides upon the problem, solution, strategies and action plan by *mutual consensus*. All team members need to be active participants in the exercise, offering their views and ideas on an equal basis. Arriving at common agreement on ends, and means to the ends, ensures individual and team ownership in the action plan. Thus the team will have the commitment to engage in the tasks necessary to reach the desired solution. When individuals who will be instrumental in attaining a goal are actively engaged in a collective process of planning, team support of goals and strategies are more readily elicited and resistance more easily overcome.

FACILITATORS AND THE INTERAGENCY PROCESS

As with any group composed of individuals from different backgrounds and organizational environments, interpersonal issues and dynamics can pose both an opportunity

and a challenge to successful team-building and problem-solving. From time to time interagency teams may find it desirable to invite an external person to facilitate a meeting, assist the team in reviewing progress, identify obstacles, or to guide the team through the problem-solving exercise described above.

An outside facilitator provides an objective sounding-board for team members to air views, impressions, and complaints more freely, without fear, or loss of respect or credibility, or finger pointing. The facilitator can be instrumental in directing the team to take a critical look at how its interpersonal dynamics and communication style are affecting, either positively or negatively, what should be collegial, collaborative team efforts.

Open communication exchange is the heart of effective collaboration and all members of an interagency group must contribute to discussions and involve themselves on a regular basis in the team's participatory decision-making process. Facilitators can more easily engage members who are reluctant to share information and ideas, when it is especially important to reach consensus on some critical issue. For example, during the development of the team's philosophy statement, which will set out those values key to guiding future team activities, the group must be assured that *every* member has not only offered input, but also accepts the final written document outlining the philosophy. This holds true for problem-solving exercises as well.

This is not to suggest that a skilled chairperson of an interagency group cannot achieve similar ends. Rather, it is TAC's experience that outside facilitators are more effective listeners and arbitrators of sticky issues, holding no vested interest in the outcome, merely directing participants in the use of consensus-building tactics. For example, TAC has used consultants skilled in organizational development and team-building at cohort training activities and during follow-up team meetings to both facilitate meetings and to train groups

in effective team-building skills. Teaching players how to be active participants and *active listeners* when engaged in group decision-making processes proved to be both a popular and an effective training strategy. Team-building and consensus-building are evolutionary, and technical assistance aimed at enhancing these processes has many rewards, both during training sessions and when state teams go it alone.

FACILITATING CHANGE: AN EVOLUTIONARY PROCESS

Transition services involve a multitude of different agencies and actors. Creating an interagency structure to respond to transition issues is a logical organizational response to this need. It is reasonable, then, that such groups are established to review existing transition services *and* to consider improvement in them if they are to provide persons with options leading to a quality life. To do so implies change in service delivery systems and identifies interagency teams as the catalyst for such change. To achieve systemic change, however, is not an easy proposition, and it will be, at best, a slow, evolutionary process.

The state interagency teams with which TAC has worked provide evidence that this is not an unachievable goal. But it does take time, literally years of hard work, to put the key components in place and to arrive at common ends that are measurable, realistic, and ultimately result in quality life changes for persons with deaf-blindness. Careful nurturing of an interagency team is a critical ingredient for success. In the preceding pages and chapters we have described those elements believed to be the salient characteristics of successful interagency endeavors culminating in systems change. TAC does not believe in any one model of successful interagency collaboration, and recognizes that different interagency groups will approach systems change in ways tailored to fit each state's political, geographical, and organizational environments.

For example, certain states, such as Wisconsin, have focused on changes that one state team member categorized as "first and second generation issues" over the course of the group's short history. First generation issues included:

- addressing the need to hire and train qualified staff
- implementation of newly devised supported employment options
- communicating "best practices" in service delivery to direct providers
- convincing other key players in the system to adopt a "vision" for consumers that makes the consumer the driving force behind organizing service delivery.

Once achieving degrees of success with these issues, second generation issues identified included:

- coordination of services and the development of a planning process taking into account the "whole person"
- encouraging the development of options, especially outside the work place
- training persons without a disability to provide support for individuals with deaf-blindness at work, at home and at play.

Changes, including systems change, are now occurring in Wisconsin. The state's interagency task force has been instrumental in this effort, owing in part to a firm grounding in and commitment to its client-oriented, value-driven mission.

Illinois, also a member of one of TAC's interagency cohorts, achieved systems change through its interagency approach. Change has taken hold gradually, but has embraced both intra- and inter-agency issues. There has been, team members agree, a recognizable and tangible change in philosophy about what services can be and should be offered to persons with deaf-blindness; services are now broader-based and more community-oriented, with community integration a value guiding the work of service providers.

Other changes in Illinois included:

- the development of state-wide training teams which share expertise in areas such as orientation and mobility, behavior modification, and communication techniques
- the creation of Regional Implementation Committees (RICs), an offshoot of the state interagency task force, to address implementation issues at the local level
- the establishment of Total Life Planning Units to look at persons with deaf-blindness and their needs through an integrated, community-oriented, *local* interagency-coordinated approach.

Five years of patience and persistence invested in interagency work is resulting in fundamental change in how Illinois' system responds to the needs of clients with deaf-blindness.

SUMMARY

Wisconsin and Illinois are but two examples of states whose interagency team efforts have begun to effect significant, systemic change. Facilitating change, however, remains a complex area of endeavor, requiring all the finesse and skills interagency teams can muster and continued identification of all the resources that can help. It is a challenge well worth the effort.

CHAPTER 6

CONCLUSIONS

Jane M. Everson

The process of moving youth with deaf-blindness and other severe disabilities from school to community-integrated adult opportunities is clearly a complex and time-consuming process, requiring the resources of multiple agencies and individuals. Interagency teams, composed of education and rehabilitation representatives, parents and consumers, and other adult service representatives have been firmly established as one viable mechanism for addressing the complex issues associated with the transition process.

Over the past six years, TAC has used clusters of four to six state interagency teams united in cohorts for training and technical assistance. Sixteen state teams forming three cohorts have taken great strides towards systems change in the collaborative transition of youth with deaf-blindness. During the course of training and technical assistance activities, TAC has identified some team characteristics and training themes that appear to be typical of the more successful state interagency teams. These interagency team characteristics and cohort training themes include: the development of a philosophy/value statement; an emphasis on team building strategies and awareness of interpersonal dynamics; inclusion of parents in the collaborative process; and development and implementation of action plans focusing on individual case studies.

SUMMARY CHARACTERISTICS OF STATE INTERAGENCY TEAMS AND THE COLLABORATIVE TRANSITION PROCESS

Philosophy/Value Statement

A value-based approach has been described throughout this monograph as the foundation of collaborative transition efforts. Transition, by definition, reflects a commitment to the values of community presence and community-integration for young adults with deaf-blindness. For the vast majority of agencies and professionals and for many families this commitment is in direct contradiction to the traditional values of educational programs and adult services. Thus, the development of a philosophy/value statement generally involves hearing new information on education, employment, living and recreation models, followed by discussions of how these new models fit into existing service models. Only then can interagency teams write or re-write a philosophy/value statement that reflects not only their commitment to community-integration, but also their acknowledgement that this commitment implies interagency collaboration and lengthy systems change efforts. This philosophy/value statement drives the team's shared vision and action plan commitments.

Although frequently a lengthy and difficult process, the development of a philosophy/value statement that is endorsed and supported by all team members helps teams answer the question, *why do we exist*? Perhaps just as importantly, it establishes their purpose to professionals and families who are not team members but who are affected by their transition efforts. It enables teams to monitor and evaluate their goals and activities as they implement the collaborative interagency process and helps to avoid goal displacement. TAC's experience with state interagency teams demonstrates that during the initial cohort training, time spent developing a philosophy/value statement or reviewing and refining a philosophy/value statement is a key to future team success. Although the development of a philosophy/value statement may occur concurrently with the development of an initial action

plan, its development is a pre-requisite for successful collaborative transition efforts.

Team-building Strategies

The development of interagency teams requires an acknowledgement and understanding of the diverse, but interdependent roles and responsibilities of team members, a shared vision, and the development of leadership skills and an action orientation. During cohort training activities, teams participate in small group activities where members are divided by agency, discipline, or family representation to discuss common issues and strategies. Teams listen to presentations on best practices in education, employment, living, and recreation programs and compare these best practices with current practices in their home states. Teams are also assisted in developing visions of future, more desirable transition services through a force-field analysis, problem-solving process. And finally, teams are guided through an action orientation through the development and implementation of action plan goals and activities.

Team building begins prior to cohort training activities, when groups initiate interagency efforts and choose to become a "team". It continues as teams are nominated for TAC training and are asked to meet certain criteria and engage in activities prior to attending the cohort workshops. Teams become cohesive and develop during the workshops and continue these efforts once they return home and begin implementing their action plans goals and activities. Frequently, the technical assistance activities connecting the cohort workshops focus on team building needs, such as communication, leadership, and group structure and processes. Team building strategies for maintaining a team's direction and focus are usually targeted in the follow-up cohort workshops.

Parent Involvement

Parent involvement has been discussed repeatedly throughout this monograph as crucial if not essential to collaborative efforts. Inviting parents to be members of state

interagency teams and to attend cohort training activities is the first step in parent involvement. During training activities, parents listen to presentations and participate in problem-solving discussions with each other and with professionals. Thus, they develop an appreciation for the complexity of the interagency process while at the same time ensuring that professionals develop an appreciation for the complexity of the parent and family role in transition. During their state's interagency team meetings, parents must be encouraged and reinforced for assuming advocacy and leadership roles.

Action Plans

Action plans function as a team's blueprint for systems change. They are a team's embodiment of the philosophy/value statement and shared vision. With goals, activities, timelines, and delineation of responsible personnel, action plans define a team's workscope for a typical six to twelve month period.

During the initial cohort workshop, teams develop an action plan which focuses on development or enhancement of transition services with community-integrated outcomes for a small number of target youth with deaf-blindness. Between the initial workshop and follow-up workshop, teams implement their goals and activities, often with technical assistance. At a follow-up workshop, teams share their progress and problems with the other state teams in their cohorts and receive additional training and support.

Cohort training activities, sponsored by TAC over the past six years, have brought 17 state interagency teams together to listen to new ideas, develop visions, share problems and successes, and build stronger parent-professional partnerships. The interagency teams participating in TAC training have returned to their home states to work on developing and expanding transition services for youth with deaf-blindness. While TAC has acted as trainer and facilitator toward this end, in the final analysis states' achievements remain, uniquely,

their own. HKNC-TAC's ultimate goal is to share these successes and pitfalls, to assist others in recognizing what can be done and how, and to advance the realization that a life of quality and value for individuals with deaf-blindness is as serious and realistic a goal as it is for anyone.

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APPENDIX A

Examples of State Interagency Team Action Plans

HELEN KELLER NATIONAL CENTER (HKNC)
TECHNICAL ASSISTANCE CENTER (TAC)

Action Plan

TA Activity: Interagency Workshop Date(s): June 13, 14, 1991

Name of State or Agency Writing Action Plan: State Interagency Team

Contact Person: _____ Phone: _____

Participant(s): Team Members _____ _____ _____

_____ _____ _____

Objective: _____

ACTIVITY	RESPONSIBLE PERSON(S)	TIMELINE	EVALUATION PROCEDURE
1. Identify individuals who met criteria for project	Emma, Rod, Joe, Ann, Jan, Janet	11/1/90	Rod calls ID mfg. and insures info there
2. Develop cooperative agreements for all agency players	All agencies identified as serving individuals selected	12/15/90	Jan written agreements distributed
3. Obtain parental or other and individual agreement to participate	Identified agency representative	1/1/91	Team
4. Determine if community inventories need to be done, and make assignments	Assigned Agency Reps.	1/15/91	Janet, Anne and Team
5. Develop Future Plan in home community for individuals accepted, and Action Plan	Team Members	3/1/91	Anne
6. Provide training in community-based programming	AAACB Members	4/1/91	AAACB Rod/Anne,Matt
7. Develop and implement plan	Ind. identified in Futures Plan	Begin in April, continue to Sept. 1991	
8. Review quality of u f i related to future plan	Team and key players	Aug. 1991	Joe or case manager

HELEN KELLER NATIONAL CENTER (HKNC)
TECHNICAL ASSISTANCE CENTER (TAC)

Action Plan

TA Activity: Interagency Workshop Date(s): June 13, 14, 1991

Name of State or Agency Writing Action Plan: State Interagency Team

Contact Person: _____ Phone: _____

Participant(s): Team Members _____ _____ _____

_____ _____ _____

Objective: _____

ACTIVITY	RESPONSIBLE PERSON(S)	TIMELINE	EVALUATION PROCEDURE
1. Send referral process and action plan letter to RC DMH and D/B programs	D-B Task Force	10/31/90	Mailed
2. Develop criteria for selection (models)	D-B Task Force	10/31/90	Criteria listing
3. Identify 6 model case study clients	D-B Task Force	12/31/90	6 clients identified
4. Prioritize order for PFP provision	D-B Task Force	12/31/90	Order developed
5. Complete referral process	Key Referral Agencies, Planning Consultant, Task Force Rep.	#1, 1/31/91	Referral Packet
6. Initial Family Contact and Home Visit	T.F. Planning Consultant	#1, 2/15/91	Home Visit Completed; Home Visit Reported
7. Identify Personal Futures Planning Team Members	T.F. Planing Consultant, Family Friends Service Provider	2/15/91	Team Identified
8. Contact HKNC/TAC and schedule PFP date, for Client #1	P.C.	2/15/91	Date Secured
9. Conduct PFP Session	PFP Team, Client	2/28/91	PFP Conducted;Written PFP

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HKNC-TAC, 4/91

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State Interagency Team Action Plan, Continued

ACTIVITY	RESPONSIBLE PERSON(S)	TIMELINE	EVALUATION PROCEDURE
10. PFP Report to Task Force	P.C. and Task Force	Feb./Apr. meeting	Agenda/Minutes
11. Implementation and Follow-up of PFP for each model client - Report Bi-monthly to Task Force	P.C. and PFP Team, Task Force	Ongoing	PFP Assignment, T.F. Minutes
12. Establish Time Lines for Remaining 5 Model Clients	Task Force	2/91	Written Schedule and Flow Chart
13. Documentation of individual client cases and evaluation of outcome	P.C.;Task Force	Ongoing	Client Summaries
14. Review and document the coordinated system that emerged through the case-study process	Task Force, HKNC/TAC	9/30/92	Written Transition System

HELEN KELLER NATIONAL CENTER (HKNC)
TECHNICAL ASSISTANCE CENTER (TAC)

Action Plan

TA Activity: Interagency Workshop Date(s): June 13, 14, 1991

Name of State or Agency Writing Action Plan: Coordinating Council for Persons Who Are Deaf-Blind

Contact Person: _____ Phone: _____

Participant(s): Council Members _____ _____ _____

_____ _____ _____

Objective: To enhance and support the delivery of value-based services in the community for 2 persons with deaf-blindness by June 1992.

ACTIVITY	RESPONSIBLE PERSON(S)	TIMELINE	EVALUATION PROCEDURE
1. Identify 2 people	Council	Today (June 24)	Chosen by consensus: Toby, Ken Alternates: Lisa, Samantha
2. Contact local people about: (A) Toby (B) Ken	Carol Dorothy	July 8, 1991	Contacts made: D. & C. call to confirm and alternate contacts called if needed.
3. Gather basic information RE: T. & K. on: - lifestyle issues - what works/doesn't - what's off/different - who key people are	Carol and Gloria Dorothy	August, 1991	Information presented at next council meeting in August
4. Seek attendance at next meeting of key people from DD and P & R by letter/phone/meeting - review action plan, mission, etc., DD - phone call - meeting/letter follow-up - P & R (Parks and Recreation)	 Dorothy Dorothy/Conchita/Carol Gloria	 June 21 June 28 June 28	 Call Made Meeting held/letter mailed Contacts Made

ACTIVITY	RESPONSIBLE PERSON(S)	TIMELINE	EVALUATION PROCEDURE
5. Receive training in PFP - request TA - training takes place	Carol TA provider/Council coordinate dates	June 21 Early Fall (Sept./Oct.)	TA request mailed Training completed
6. Discuss logistics of PFP - Identify 2 people to receive intensive training - Formulate tentative agenda (2 prep days; 1/2 day overview; do 2 plans)	Council Council	August August	Agenda developed
7. Review info RE: T. & K. - What can we do right away? - Identify gaps - What is happening relative to our value statement? - What is missing? - What initial steps must be taken?	Council	August Council Meeting	talks assigned to Council for follow-up
8. Review information RE: PFP prior to August meeting - Send info - Distribute info	Mike Gloria	July July/August	Info distributed
9. Pat/Mike call after August meeting	Carol	September 1	Call made
10. Next meeting, set steps for follow-up on 2 persons identified	Council	August, 1991	Action Plan continued

APPENDIX B

Structural Procedures and Guidelines for State Interagency Teams

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Structural Procedures and Guidelines for State Interagency Teams

STRUCTURE

1) **Membership**

- note who members are
- review membership on a periodic basis

2) **Chairs/Leadership**

- co-chair or chair/vice -chair system works well, with one chair a parent or consumer
- limit terms to one or two years to ensure rotation of leadership allowing for fresh perspectives and to spread responsibility
- identify person(s) to take minutes

3) **Meeting Location**

- rotate meeting sites and host agency's responsibilities
- hold meetings in different geographic locations (as feasible)

4) **Agenda and Minutes**

- keep agenda short and focused
- prepare and distribute in advance
- note persons responsible for tasks
- approve minutes at each meeting

5) **Meeting Dates**

- decide how often the group wishes to meet
- schedule meetings in advance for one year
- choose locations in advance

6) **Committees**

- divide into committees to distribute workload and make issues manageable
- keep lists of committee members and tasks assigned
- have all team members sit on a committee
- designate committee chairs

7) **Name of the Group**

- choose a name by consensus to foster identify and individual ownership in the team
- review the name carefully; names can connote different meanings in different political environments, and may affect the role a team can or wants to play in a state

8) **Formal vs. Informal Status**

- interagency teams are not usually composed of top agency management
- commitment from higher-ups is useful, even necessary to allow key personnel to join the team

Formal Groups

- official status, conferred by legislative or executive mandate
- helps with costs
- provides higher visibility
- assures more continuity of membership
- less flexibility may result
- membership may be skewed toward top officials
- potential for more *red tape* and longer time frames needed to reach goals

Informal Groups

- may be more desirable at outset
- may appear less threatening
- more flexibility in choosing members and setting goals
- advocacy activities easier to engage in
- accountability problems may occur
- attendance may be spotty and membership turnover high

- political factors and why the team was created may help determine status
- formal teams may disband into a more informal one
- informal teams may decide to seek official sanction

9) **Letterhead**

- letterhead can generate visibility and autonomy
- useful where practical, but avoid political consequences

PROCESS

1) **Participatory Democracy**

- group decision-making processes are preferable
- Roberts Rules of Order can set the parameters for group discussion and establish clear voting procedures (see References: Thomas, H. H.)
- avoid votes on controversial issues; try to form a consensus
- create an atmosphere of openness, by building a common understanding
- share information
- keep communication free and non-judgmental
- all members need to be active participants in team discussions and activities

2) **Philosophy Statement**

- identify a common set of values to guide the team
- keep written copies available for reference, review, and evaluation

3) **Goal Setting**

- develop a *few* clear, measurable goals
- generate specific activities from goals
- where there are many priorities, there is frequently no priority
- goals must be broad enough to generate consensus; specific enough to have a feeling of accomplishment

4) **Action Plan**

- develop a written action plan
- include goals, activities, timelines, person responsible and evaluation procedure
- all team members should have task assignments between meetings to enhance a sense of ownership, and to maintain group cohesiveness and commitment to the group's ends

5) **Goal Review and Evaluation**

- set specific dates to review progress toward goals
- build review into team's operating procedures to provide a non-threatening control mechanism
- allows for critical reassessment to catch unrealistic time frames, to revise goals more complex than originally thought, to address thorny obstacles
- assists in development of *team* responsibility based on *individual* accountability.

6) **Case-Study Focus**

- use case-study approach to begin to address transition issues based on actual persons
- ensures that the work of a team is client-oriented
- helps identify strategies where goals are clear but specific steps are not

7) **Special Projects**

- help when teams get bogged down or need rejuvenation
- involve all team members
- carry short timelines
- help to build morale and a sense team can achieve successes

8) **Year-End Acknowledgements**

- set aside time to applaud *team's* accomplishments and *individual* member activities
- emphasize goals attained because of collective effort
- renew team solidarity and retain sense of momentum, based on *collegial* actions